

# User manual

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XperiDo template design add-in for Microsoft Word

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# 1 Introduction

## 1.1 XperiDo add-in for Microsoft Word

This document is a user manual for the XperiDo add-in for Microsoft Word (from here on simply referred to as [the add-in](#)). With the add-in you can create and edit XperiDo templates for automatic document creation. The aim of this manual is to guide you through the essential features of the add-in. For more detailed information on XperiDo and the XperiDo add-in for Microsoft Word, please visit [www.xperido.com](http://www.xperido.com) or contact your local XperiDo partner.

## 1.2 About this document

### 1.2.1 *Disclaimer*

In this manual, we try our best to explain every function of the add-in in a manner that's understandable to everyone. If something isn't clear, wrong or missing, please let us know by sending an email to [info@invenso.com](mailto:info@invenso.com).

The images in this document are taken from various versions of the add-in. If you notice that the screenshots in this manual don't always fully correspond to your screen, know that the main functionality hasn't changed, and that purely aesthetic changes might not be updated immediately in the manual.

### 1.2.2 *Version*

This manual is up to date with the [latest stable release of the Word add-in](#).



## 2 Setup

This chapter explains how to install, update and uninstall the add-in.

### 2.1 Installing the add-in

#### 2.1.1 Before installation

Before you install the add-in, please verify that your computer meets the following requirements and possesses the following prerequisites:

##### 2.1.1.1 System requirements

We advise the following:

- **Operating system:** Windows 7 / Windows 8 / Windows Vista service pack 1 / Windows XP service pack 3
- **Memory:** 512 MB+
- **Disk space:** 120 MB+
- **Processor speed:** Pentium 1 Ghz+
- **Internet access** (access to the XperiDo server)

##### 2.1.1.2 Software prerequisites

The installer will verify that the following prerequisites are present on your system and it will prompt you to download and install missing components, provided that these are freely available for download.

- Windows Installer 3.1+
- Internet Explorer 5.01+
- Microsoft Word 2007/2010/2013
- Microsoft .NET Framework 4.5+
- Microsoft Visual Studio 2010 Tools for Office Runtime

#### 2.1.2 Installation

Follow these steps to install the add-in:

- 1) Download the installer from [this page](#).
- 2) Run the installer. This will start a wizard that will guide you through the process.

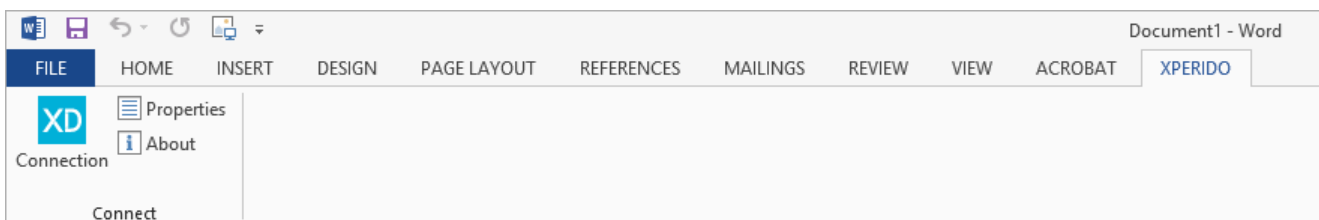


3) Follow the wizard's steps until the end.

The installer will verify that your system meets the necessary requirements and it will prompt you to download and install missing components, provided that these are freely available for download.

### 2.1.3 After installation

Once the add-in is installed on your system, a new **XperiDo** tab will appear in the Microsoft Word ribbon.



You are now ready to connect to the project where your templates are stored. More information about how to set up can be found on [this page](#).

If the XperiDo tab does not appear in the ribbon, you can check a few things:

#### 2.1.3.1 Verify the prerequisites

Verify that these prerequisites are installed on your computer:

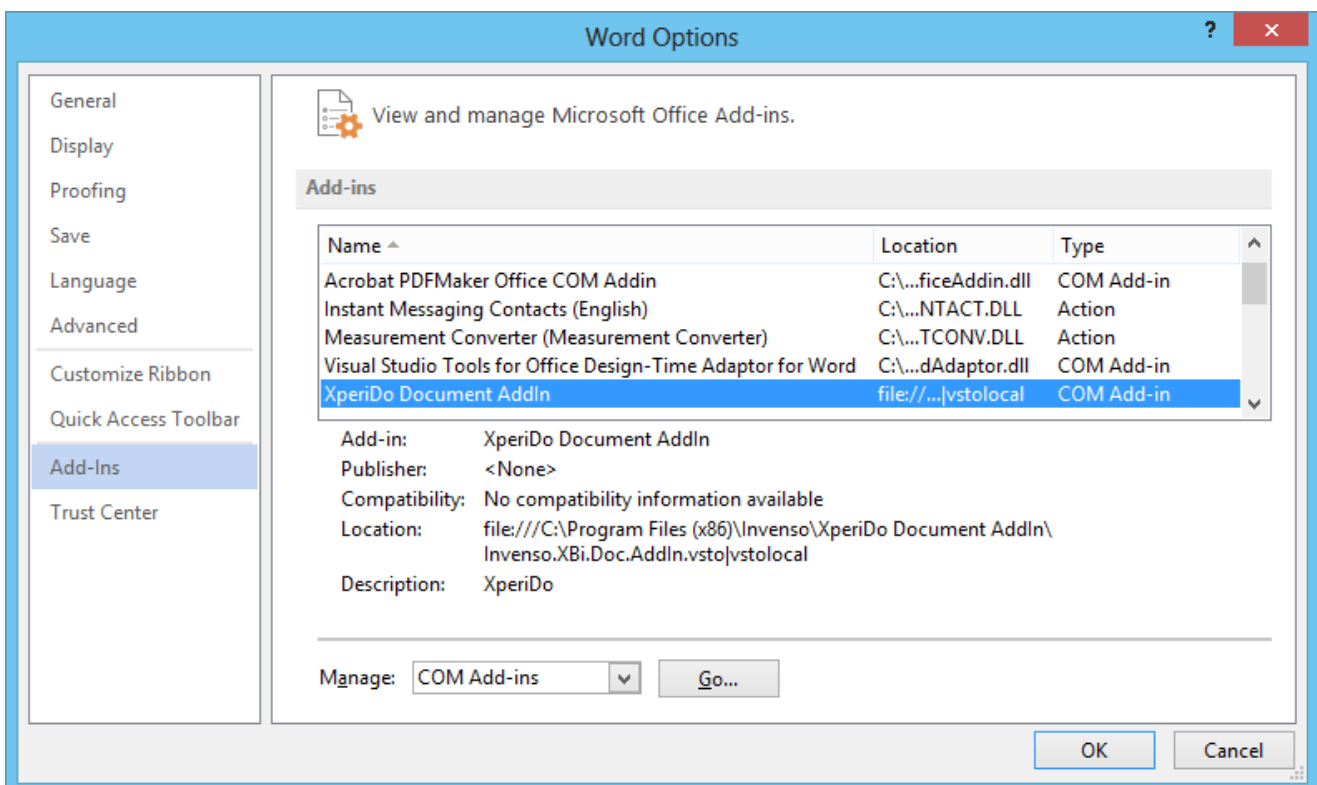
- Windows Installer 3.1+
- Internet Explorer 5.01+
- Microsoft Word 2007/2010/2013
- [Microsoft .NET Framework 4.5+](#)

- Microsoft Visual Studio 2010 Tools for Office Runtime

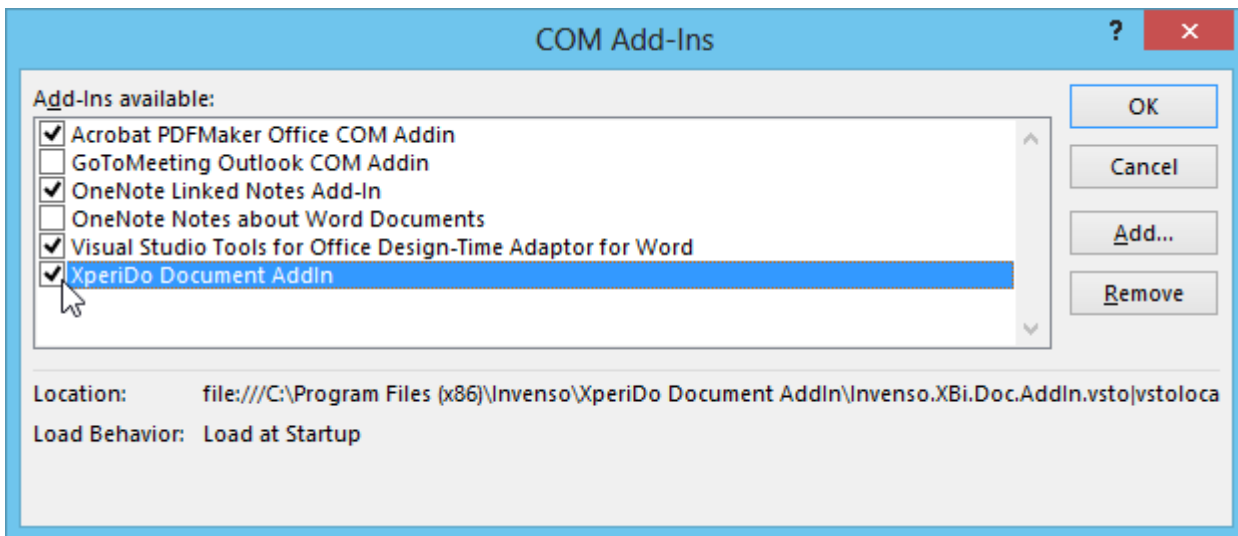
### 2.1.3.2 Verify that the add-in is active

Navigate to **File > Options > Add-Ins** and verify that the XperiDo add-in is marked as an **Active Application Add-In**.

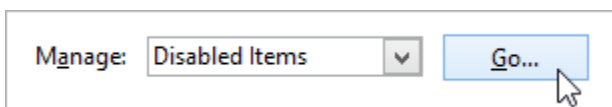
If it is listed with the **Inactive Application Add-Ins**, select **COM Add-Ins** and click the **Go** button at the bottom of the dialogue box.



In the window that pops up, check the box next to **XperiDo Document AddIn** and click **OK**.



Should the XperiDo add-in not appear in the list, select [Disabled Items](#) at the bottom of the screen and click [Go](#).



The XperiDo add-in might appear in the list in the window that pops up. If so, select it and click [Enable](#).

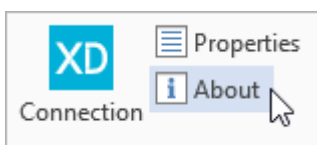
### 2.1.3.3 Further help

If you are unable to get the add-in working on your system, please [contact our helpdesk](#).

## 2.2 Updating the add-in

If you want to update your add-in, you need to check the version numbers of both your current version and of the version you wish to install.

You can check your version number by clicking [About](#) in the XperiDo ribbon:



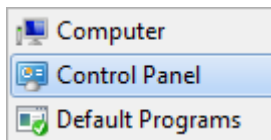
The version number is the one between brackets: [6.6.68](#) in the above screenshot. 6.6 is the [major](#) version, 68 is the [minor](#) version.

- If both versions have the same major version number, you can run the new version's installer and install the new add-in over the previous one.
- If both versions have a different major version number, you need to remove the add-in before you can install the new one.

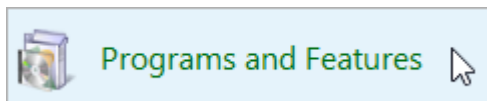
## 2.3 Uninstalling the add-in

To uninstall the add-in, follow these steps:


- 1) Go to the Windows Control Panel.



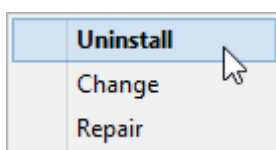
- 2) Open Programs & Features.



- 3) Find the XperiDo Document Add-in.

 XperiDo Document Add-in	Invenso	8/06/2015	92,9 MB	6.6.68
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- 4) Right-click it and click Uninstall.



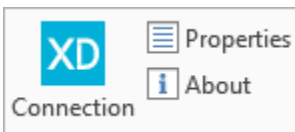
The add-in is now removed from your system.

## 3 Server connection

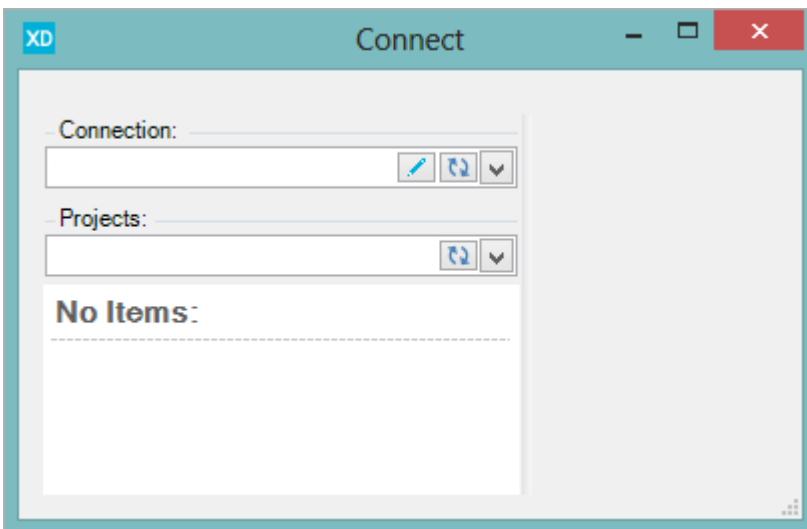
XperiDo is a server application, which means that you need to establish a connection between your local computer and an XperiDo server. This chapter explains how to set up and manage your connections.

### 3.1 Accessing your connections

To connect to your XperiDo server, click the [Connection](#) button in the XperiDo ribbon:



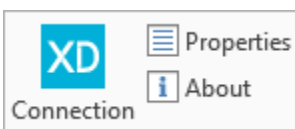
This opens the [Connect](#) window.

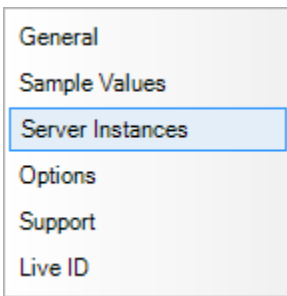


Click the blue pencil inside the empty connection box to open the connection settings.



These settings can also be opened by clicking [Properties](#) in the XperiDo ribbon, followed by clicking [Server Instances](#).



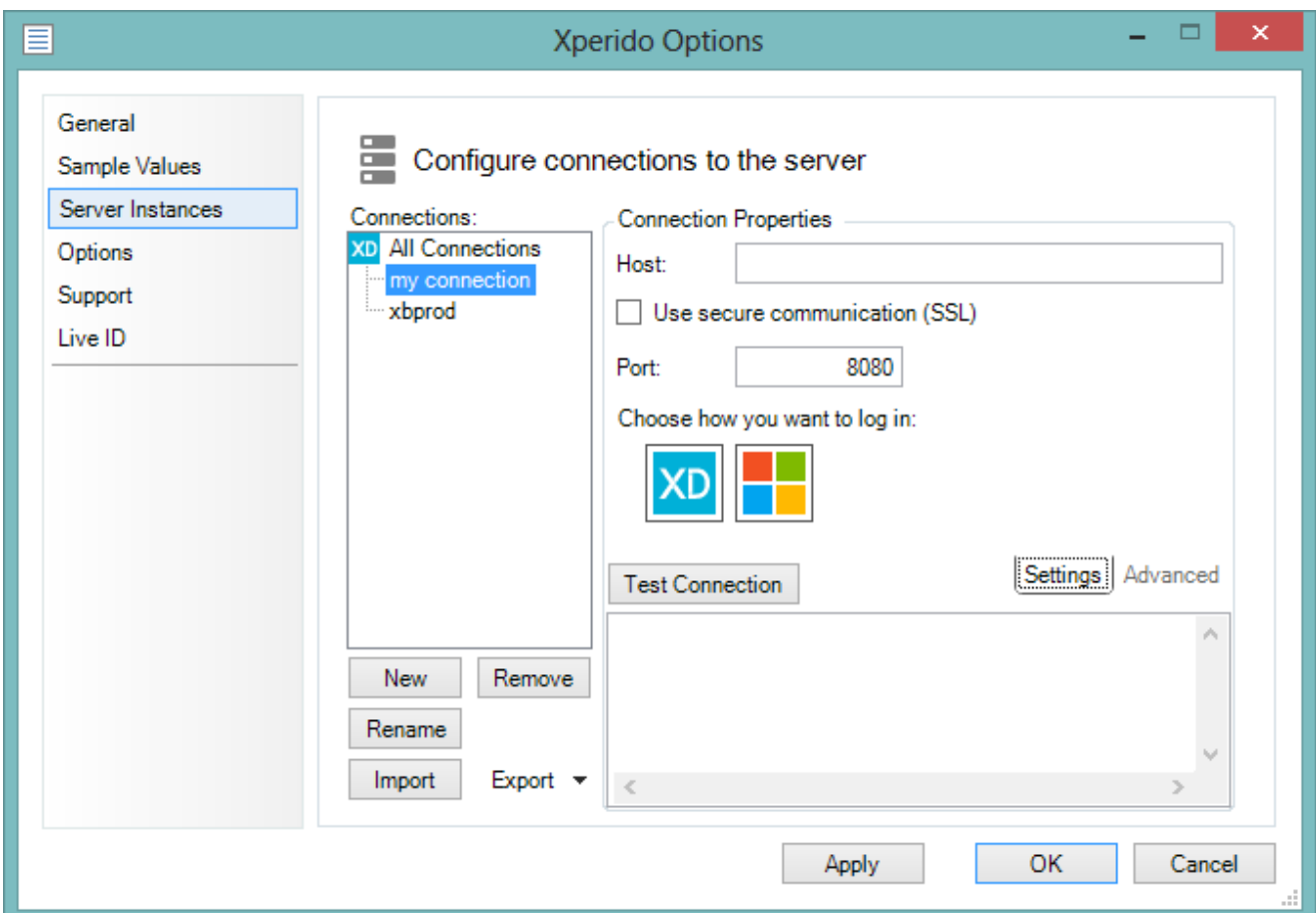


## 3.2 Managing your connections

In this window, you can manage your different connections. This is useful when you have multiple environments/XperiDo servers to connect to.

### 3.2.1 Creating a new connection

To create a new connection, click [New](#).



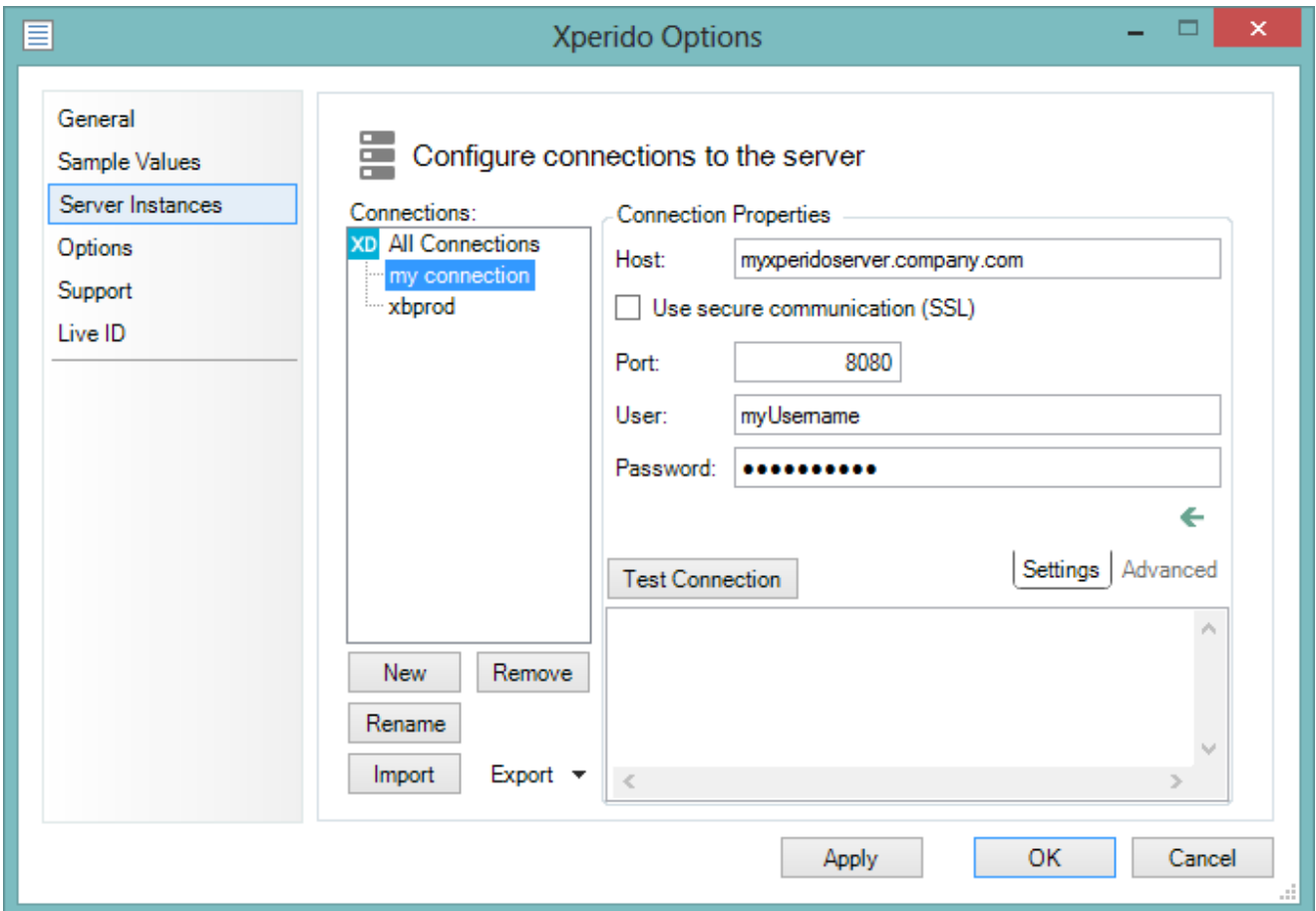
In here, you'll need to specify a few things:

- **Host** is the DNS name of the XperiDo server.
- **Port** is the port through which the XperiDo server is accessible (usually 8080).

- The **type of connection** is either by using an **XperiDo native ID** or through a **Microsoft account** (also known as a Windows Live ID). If you want to use an XperiDo native ID, click the blue XD icon, if you want to use a Microsoft account, click the Microsoft logo.

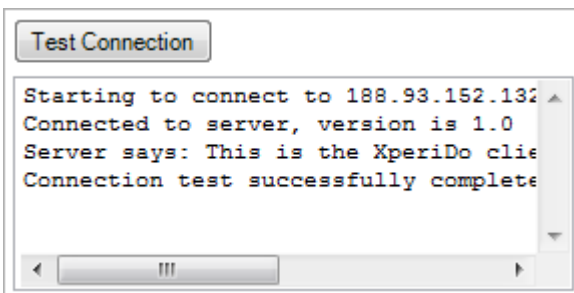
3.2.1.1 XperiDo native ID

An XperiDo native ID uses the credentials you got from your XperiDo partner. Input them in the correct boxes and click **Apply** to save the connection properties.



If you want to go back to selecting an XperiDo native ID/Microsoft account, click the **green arrow** to the right.

Click **Test Connection** to test the connection.





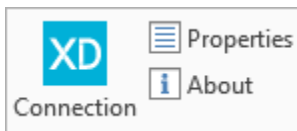
### 3.2.1.2 Microsoft account (Windows Live ID)

You can also use your Microsoft account to authenticate yourself. This is only possible if your email address has been recognized by the applicable XperiDo server. If you wish to use this method for authentication, please [contact our helpdesk](#) so that we can register your e-mail address.

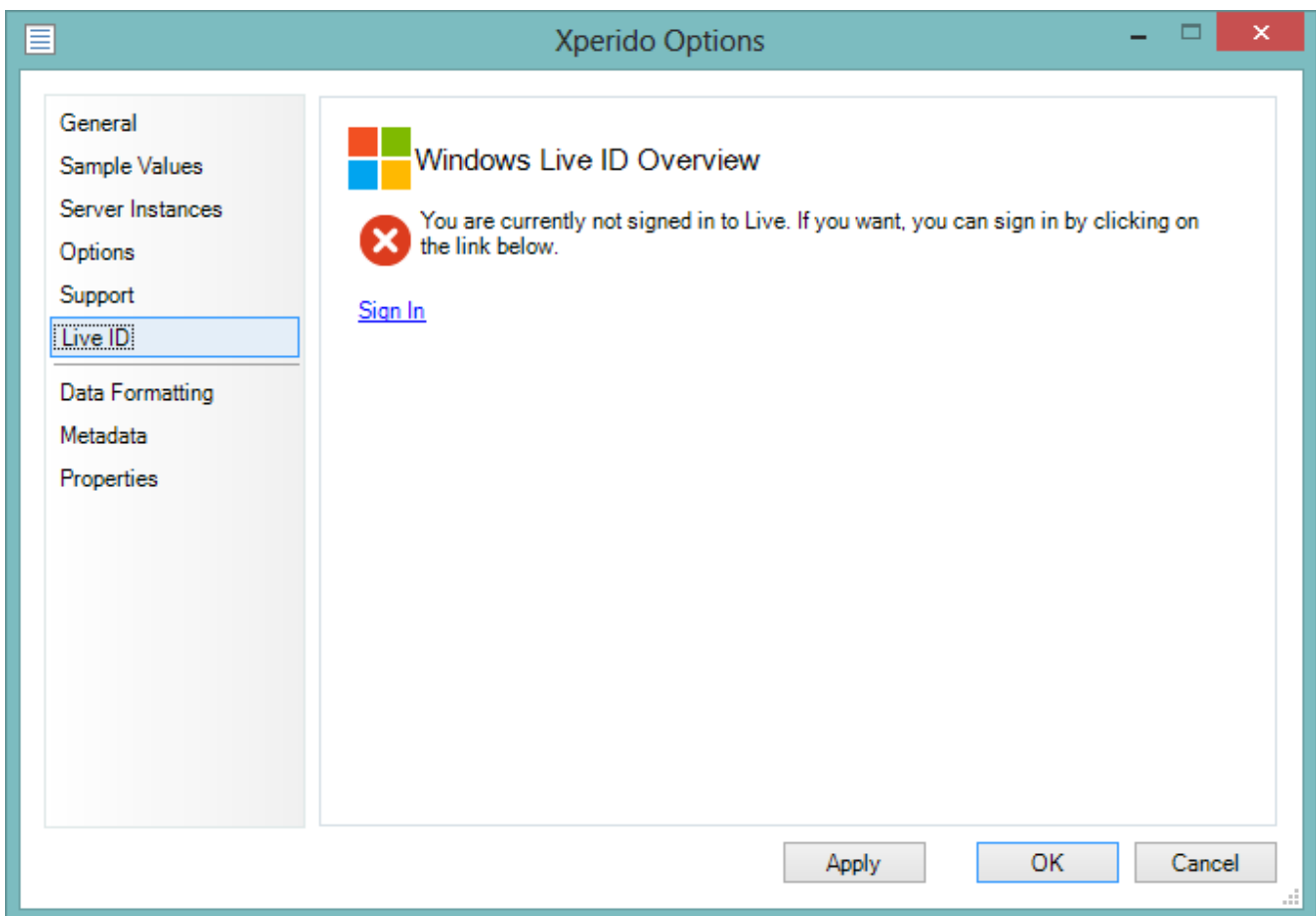
To use your Microsoft account, type in `localhost` in the host box, then click **Test Connection**. A window will pop up, asking for your credentials. Log in to Microsoft with your email address. Once this is done, you will need to give XperiDo authorization to use your email address for authentication. This email address is used to assign rights to you.

Clicking **Yes** will send the email address to the XperiDo server, which will allow you to work with XperiDo by using your Microsoft account.

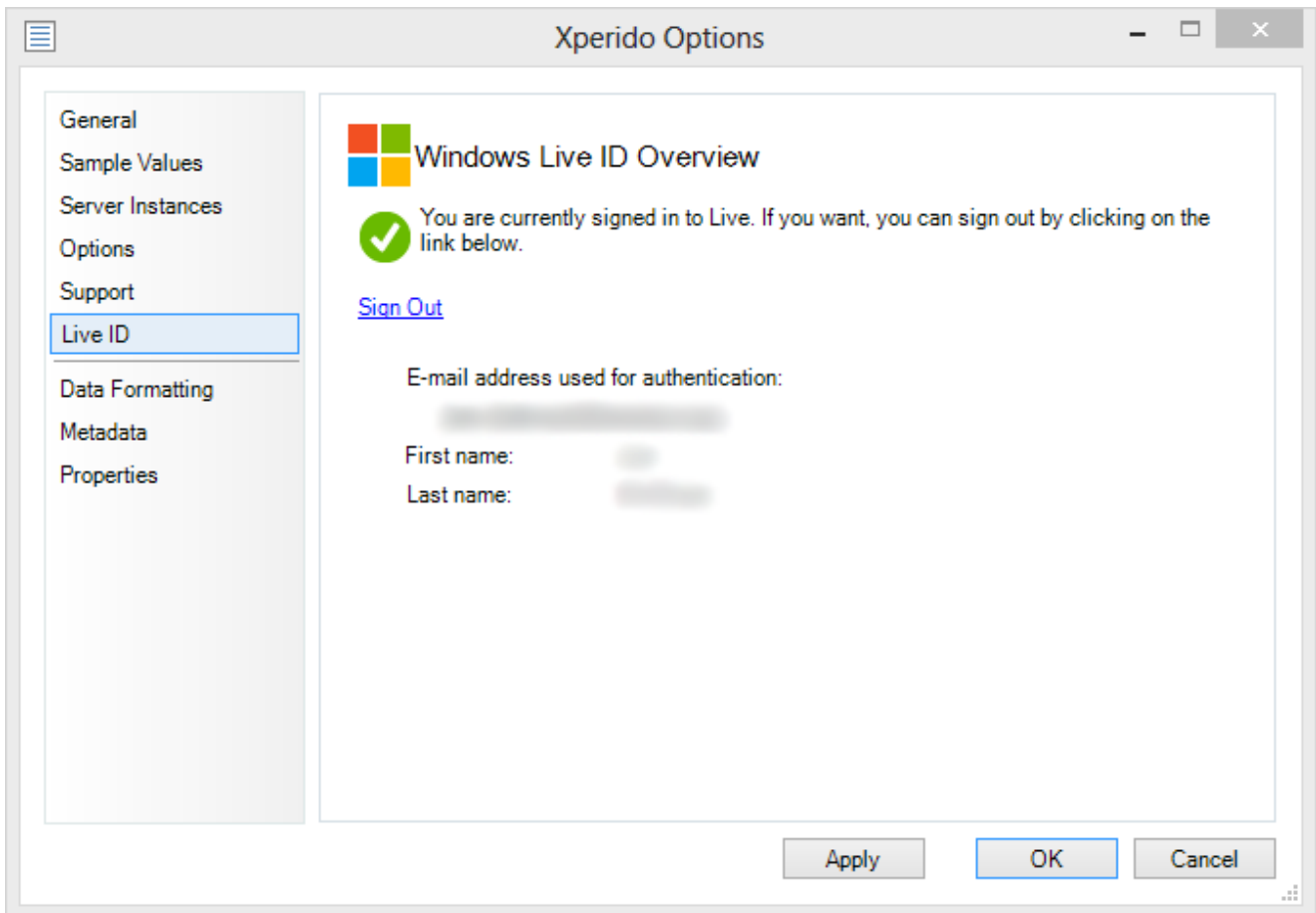
Additionally, you can choose to sign in beforehand, by setting the properties in the XperiDo options. To do this, click **Properties**.



Then, choose **Live ID**. Click **Sign In**.

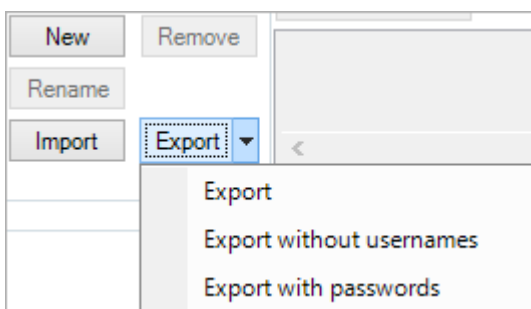


The authentication procedure (as described above) will start. Once logged in, you can see the information that is retrieved from the server.



### 3.2.2 Exporting and importing connections

You can export a connection so that someone else can import it. To do this, select a connection, fill in the credentials and click [Export](#):

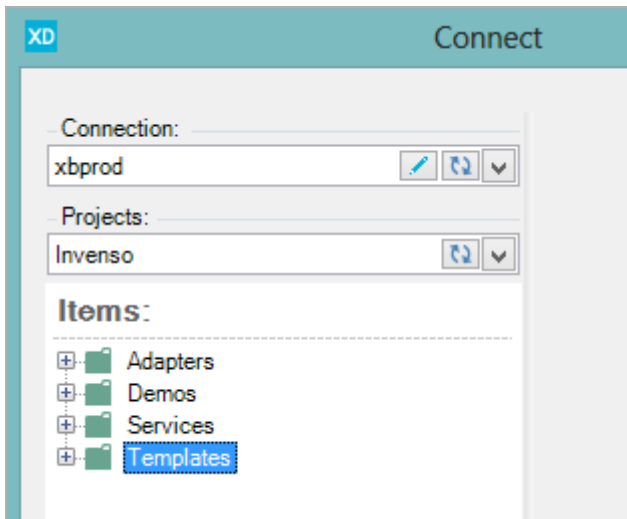


- [Export](#): this exports the connection with the username but without the password.
- [Export without usernames](#): this exports the connection without the username and password.
- [Export with passwords](#): this exports the connection with both the username and password.

The connection will be exported as an XML file. To import an XML connection file, click [Import](#) and select the file.

### 3.3 Connecting to your project

Once you have set up a connection, it will be selectable in the dropdown list in the [Connect](#) window. In the following screenshot, the `xbprod` connection is chosen.



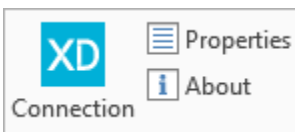
After choosing your connection, the [Projects](#) dropdown list will show the available projects. Select the project you want to connect to, then navigate to the template you want to open.

## 4 Templates

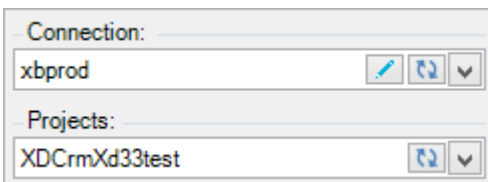
Using the template design add-in requires that you know how to open or import templates. This chapter covers the basics of opening templates for editing.

### 4.1 Opening an existing template

To open an existing XperiDo template, go to the [Connection](#) panel by clicking the large blue XD icon in the upper left corner of the XperiDo ribbon.



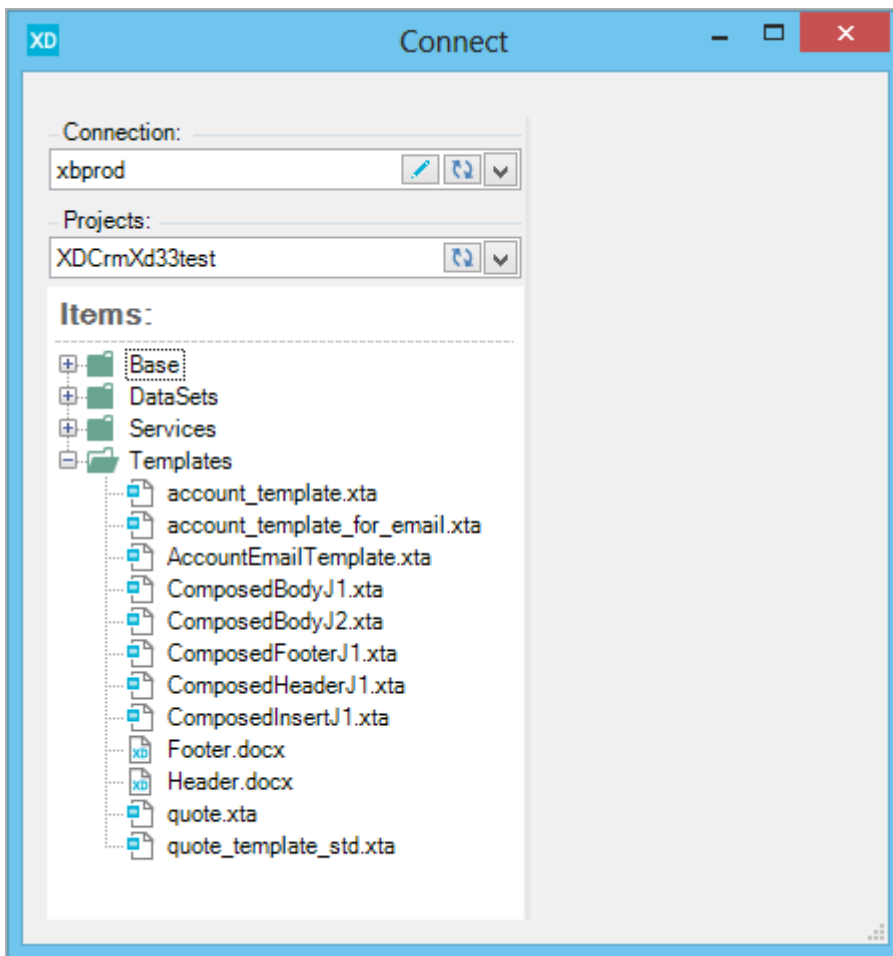
In the window that pops up, select a connection and a project.



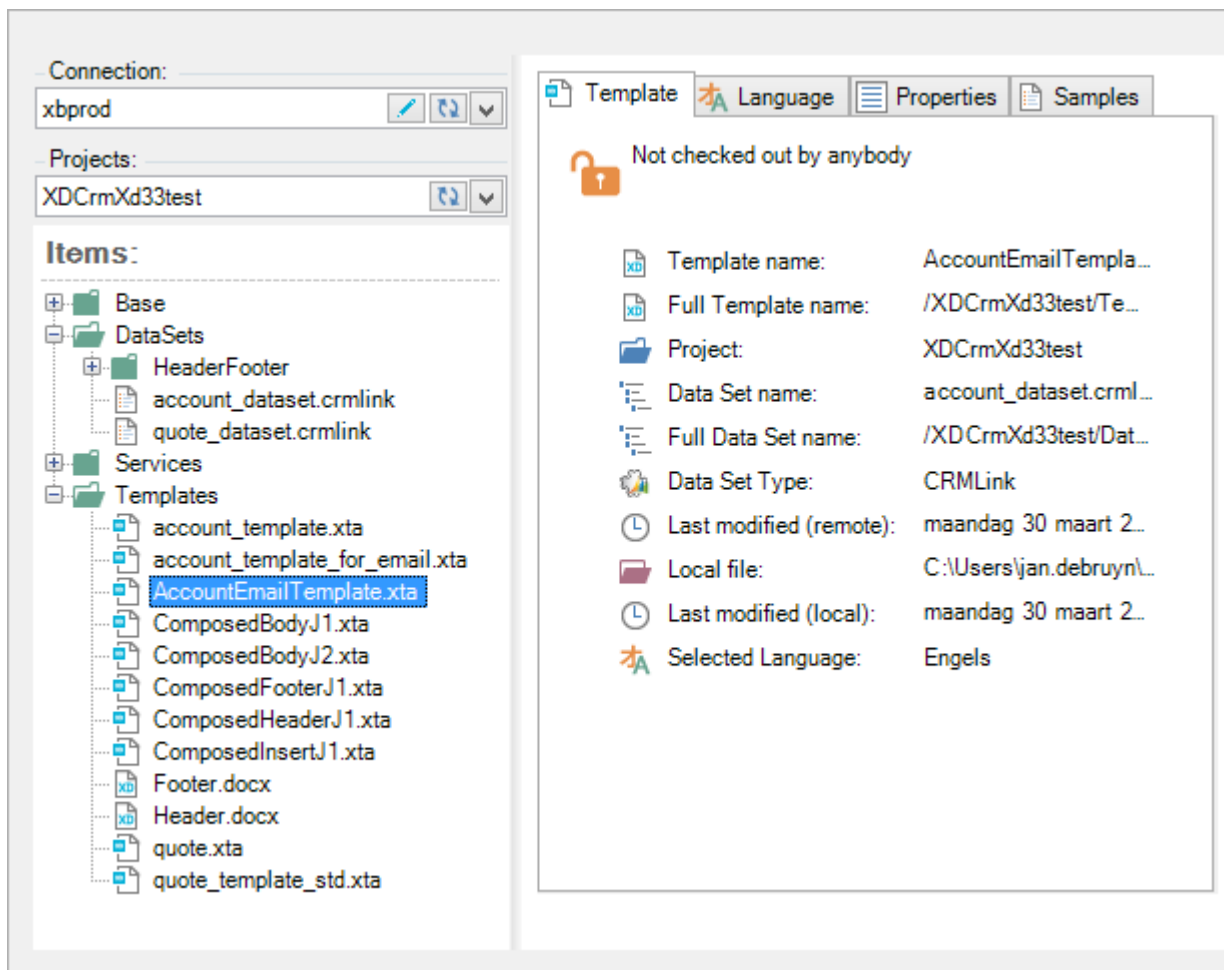
Once you have selected a project, a list of the folders and items inside this project opens. There are 2 ways of opening a template: either via the [Templates](#) folder or via the [DataSets](#) folder.

#### 4.1.1 *Via the templates folder*

The [Templates](#) folder shows you a list of all the templates.



In here, select a template to bring up more information about this template:

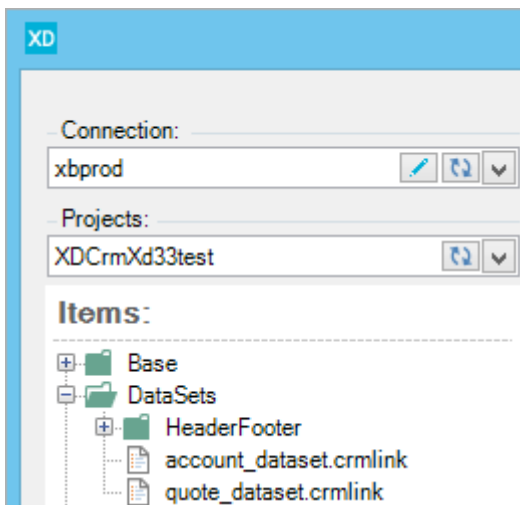


In the **Template** tab, you can view some of the template's properties. For more detailed information, click the **Properties** tab. Click the **Samples** tab to see which samples are available for this template. For more information about the **Language** tab, please read [this chapter](#).

To open your template, click **Open** or **Open and Check out**. The difference between these options are due to XperiDo's revision control system. You can read more about this in [this chapter](#).

#### 4.1.2 Via the datasets folder

To open a template via the datasets folder, go to the **DataSets** folder:

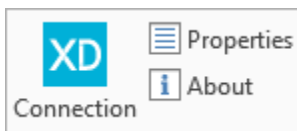


A list of the templates, associated with this data source, will be shown. Select one of them and click [Open](#) or [Open and Check out](#) to open it. The difference between these options are due to XperiDo's revision control system, which you can read more about in [this chapter](#).

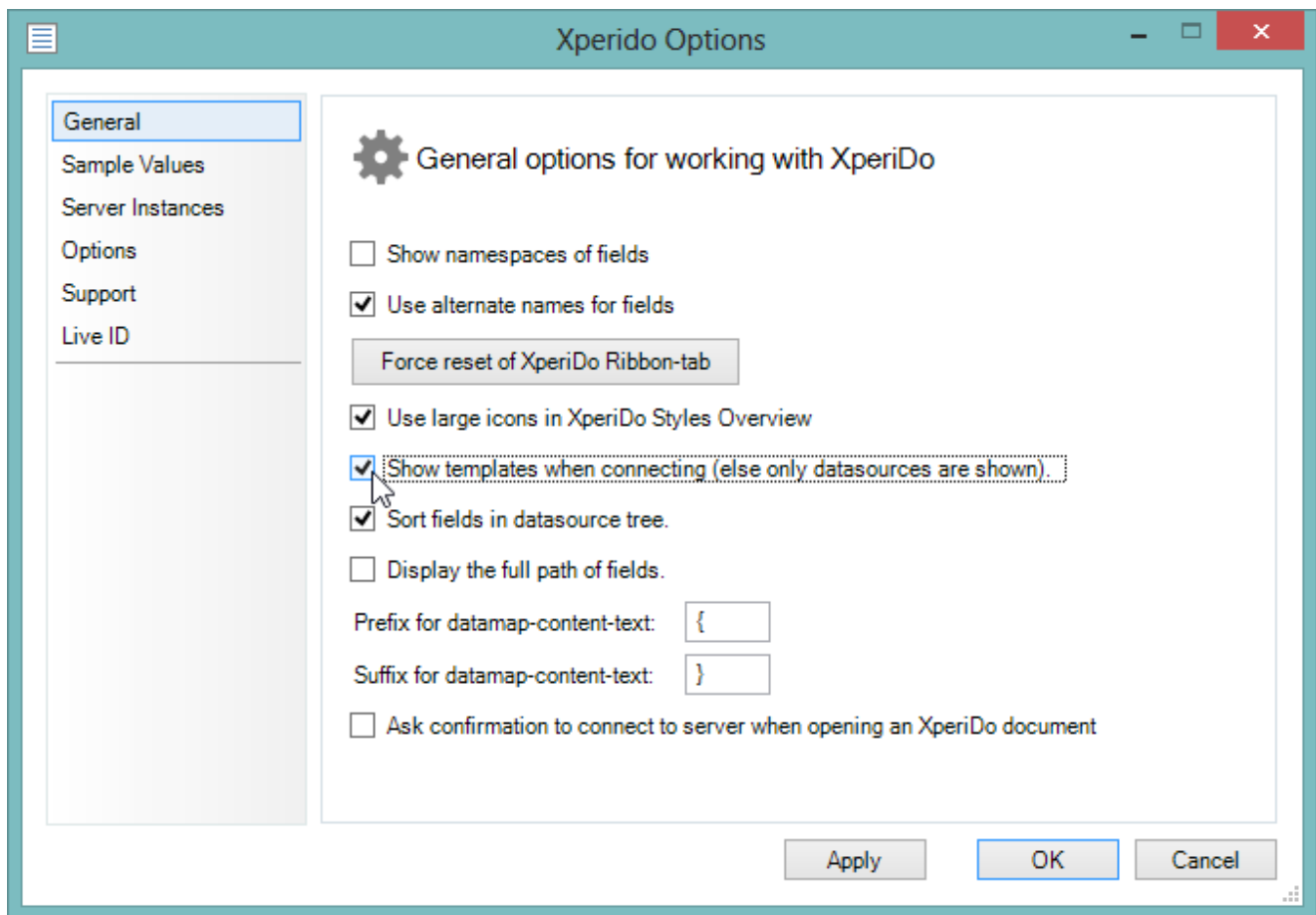
#### 4.1.3 Speeding up things

Should you have a very large amount of templates, it might take a while for XperiDo to have finished loading all of them. If you find the waiting time to be too long, you can change XperiDo's loading behaviour to not load all the templates at once.

Click on [Properties](#) in the ribbon to open up the [XperiDo Options](#):



Then, go to [General](#) and find [Show templates when connecting](#).



Disabling this option will speed up the process because templates are only loaded when you click on a data source. Now, you can find the templates associated with a data source by clicking on that data source.

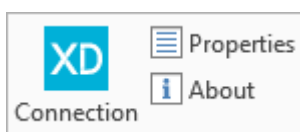
## 4.2 Importing and exporting templates

### 4.2.1 Export

With XperiDo for Word, you can export templates so you can send them to someone else. This is especially useful when you have a question for the Invenso helpdesk team.

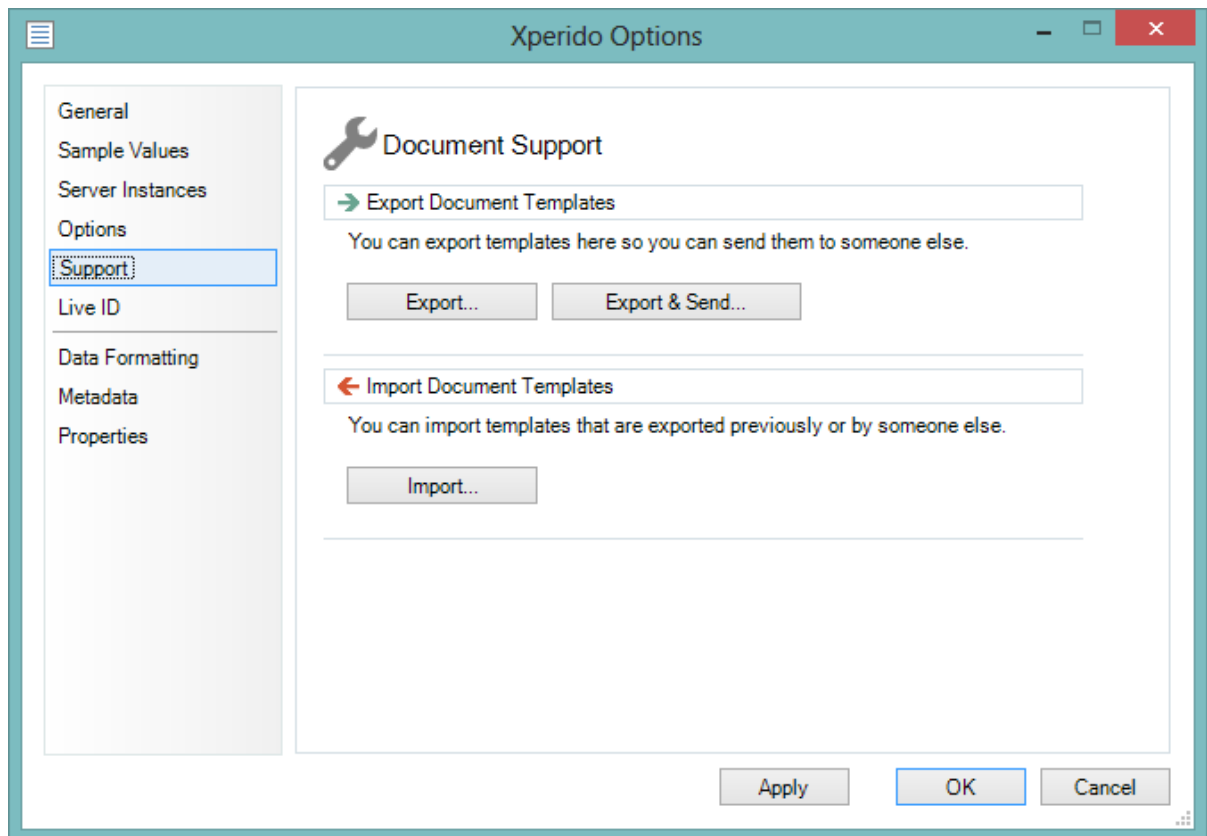
To export templates, follow these steps:

- 1) Open the template you wish to export.
- 2) In the XperiDo ribbon, click [Properties](#):



- 3) Click [Support](#) in the left pane of the window:





- 4) Click the [Export](#) or the [Export & Send](#) button to start the export. Both buttons will produce a file that can be imported later. [Export & Send](#) will also open your email client, create a new email and attach the file to the email.
- 5) A wizard will open to guide you through the process. In the first screen, the names of the document and the datasource will be shown. You can also choose whether to include diagnostic information, such as the version of Microsoft Word you are using. If you are planning to send this template to the Invenso helpdesk, it is advised to check this box. You can also choose which samples to include. Click [Next](#) to continue.

**Document Template For Export**

The document template you are about to export is: ShippingOrderTemplate.docx  
 Full name: /XDBaselInvenso/Templates/ShippingOrderTemplate.docx

The datasource that will be exported together with the template is: ShippingOrder.xsd  
 Full name: /XDBaselInvenso/Queries/ShippingOrder.xsd

**Select Additional Data To Export**

Include system diagnostics information

Samples: Active Sample | All | None

- ShippingOrderXML.xml

< Back    Next >    Cancel

- On the second screen, you can select a folder where all the export files will be placed. By default, the name of the template will be used as the name for the export file, but you can choose to change it. There is also an option to remove temporary files that were created during the export process. Click [Next](#) to continue.

**Select Destination**

The data that is selected for export will be put together in a file that is suitable for transportation. You need to select a location on your computer where this file can be stored. Please select a location you can easily retrieve later.

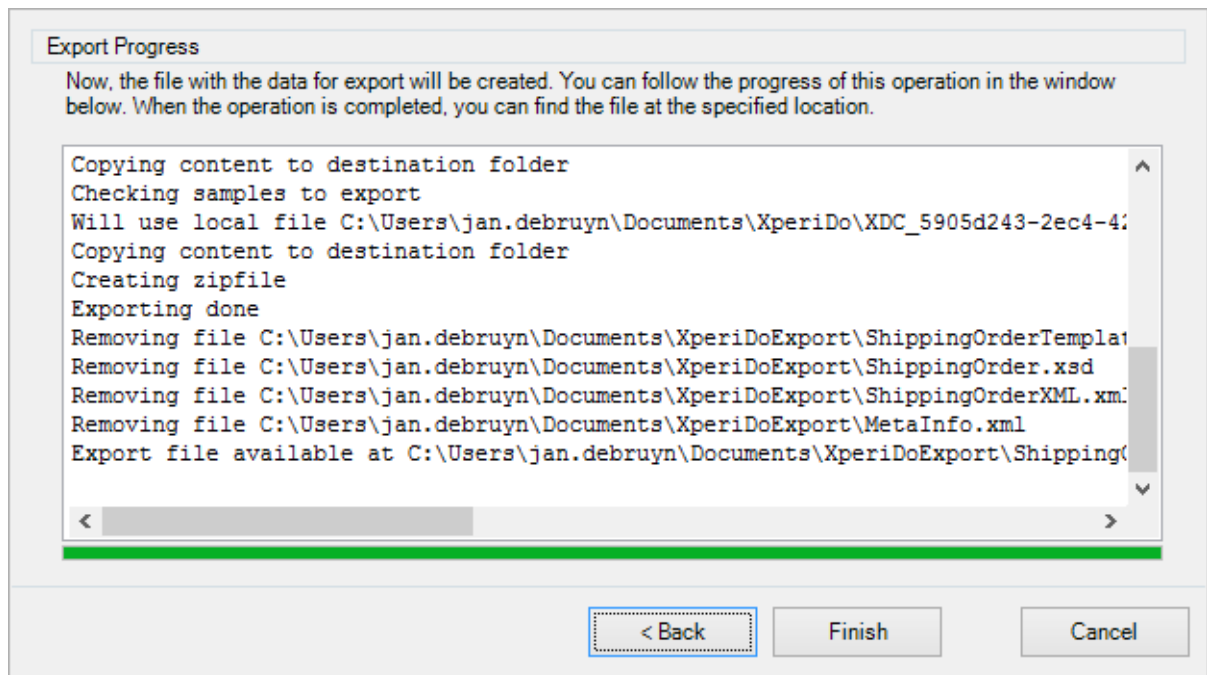
Folder: C:\Users\jan.debruyne\Documents\XperiDoExport

Filename: ShippingOrderTemplate.zip

Remove temporary files that were created during the export after finishing the export

< Back    Next >    Cancel

- The final screen shows the progress of the export action. When the export is finished, the location of the file is shown. Click [Finish](#) to close the wizard.

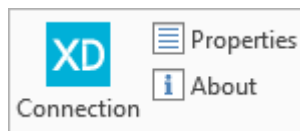


- 8) If you clicked [Export & Send](#), a new mail window will be open, with the exported files as attachments.

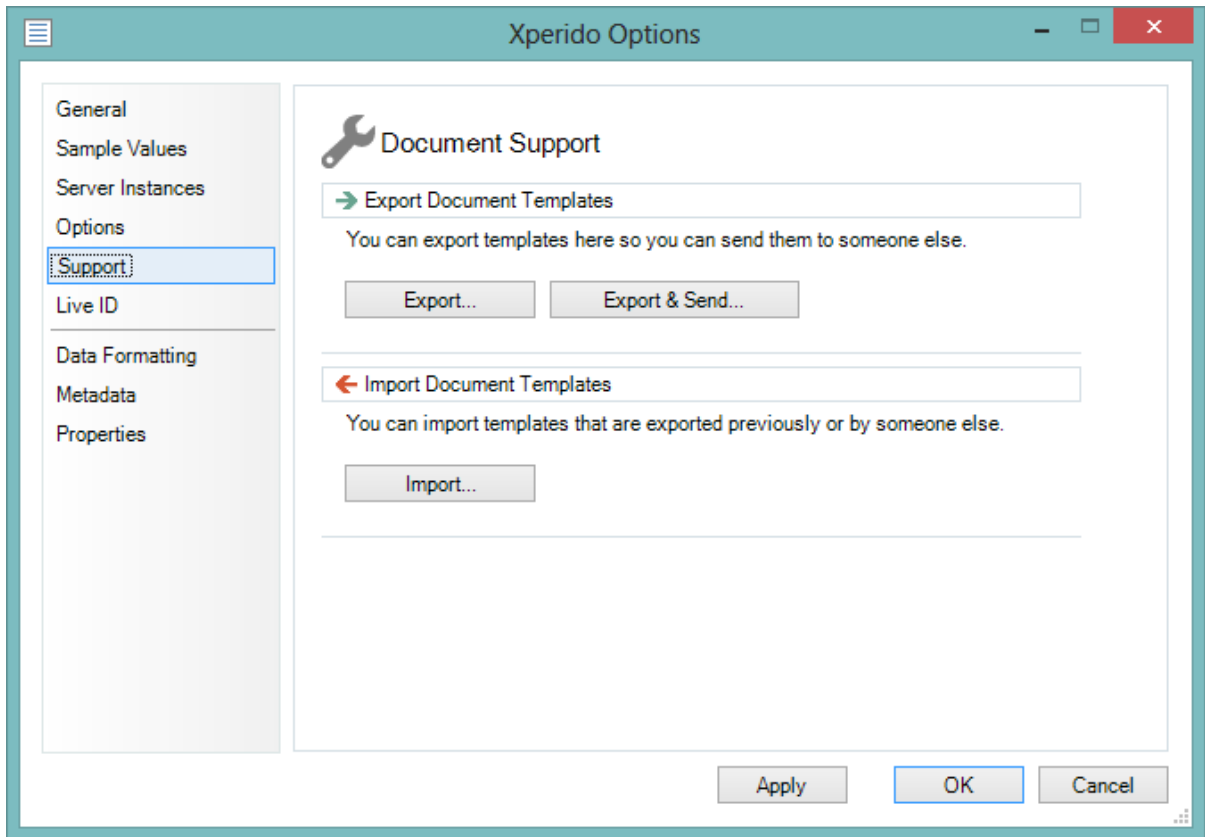
#### 4.2.2 Import

You can import templates by following these steps:

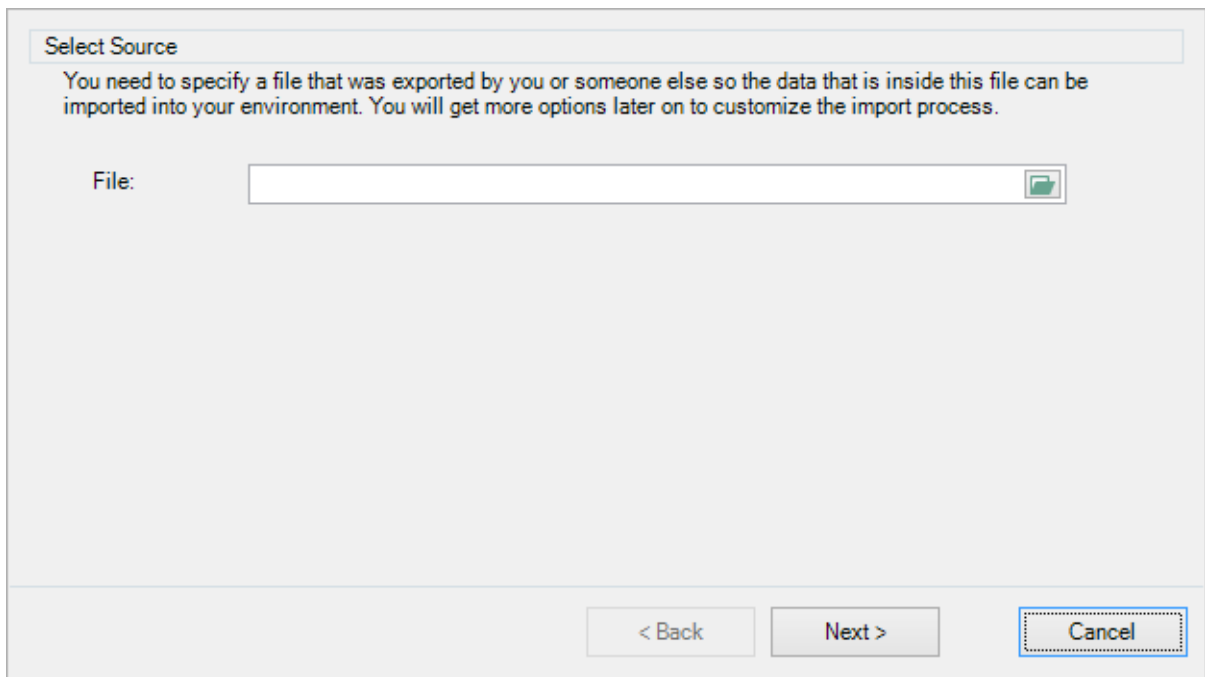
- 1) In the XperiDo ribbon, click [Properties](#):



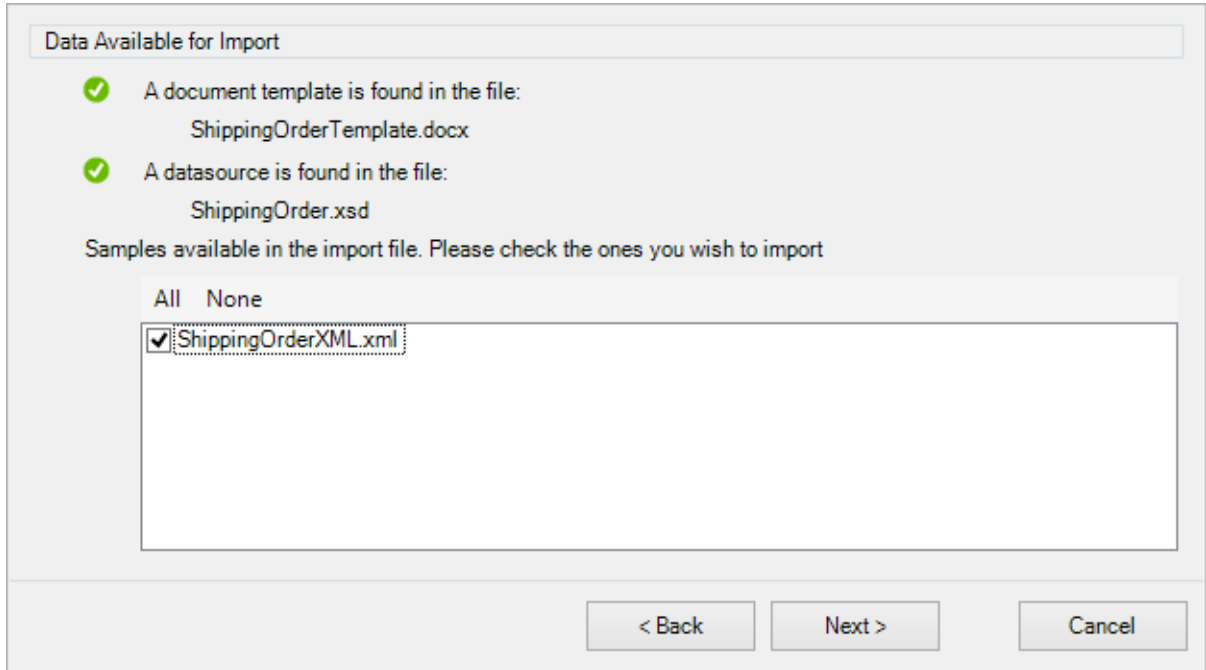
- 2) Click [Support](#) in the left pane of the window:



- 3) Click the [Import](#) button to start the import.
- 4) A wizard will open to guide you through the process. On the first screen, you need to select the file you wish to import. Click [Next](#) to continue.



- 5) If this is a valid file, the next screen will show you what is inside the file. If there are samples present, you can select which samples you want to include. Click [Next](#) to continue.



- 6) This screen will show you the [connection](#) to use and the [project](#) to import into, based on what is in the export file. You can choose to restore the files to their original location, or you can specify a group in which all the files that are imported will be placed. The box that says [Import Datasource](#) should be checked if you want to import the data source. When you already have the data source in your repository, you might not want to import the data source. The option [Check to overwrite...](#) should be checked if you want to overwrite items that already exist. If you leave it unchecked, items with the same name will get a suffix added to their name during import. Click [Next](#) to continue.

The 'Import to' dialog box contains the following elements:

- Import to** (Title bar)
- Connection:** my connection (with edit, refresh, and dropdown icons)
- Project:** XDCrmlInvensoProd (with refresh and dropdown icons)
- Original Location
- Choose other location: Group: ImportedTest
- Import Datasource
- Check to overwrite items that might already exist, otherwise, new items will be created.
- Samples to import:** ShippingOrderXML.xml (in a text area)
- Buttons: < Back, Next >, Cancel

- 7) The final screen shows the progress of the import action. You can choose to open the template upon completion by checking the box that says so. Click [Finish](#) to close the wizard.

The 'Import Progress' dialog box contains the following elements:

- Import Progress** (Title bar)
- Now, the file with the data for export will be created. You can follow the progress of this operation in the window below. When the operation is completed, you can find the file at the specified location.
- Log text:
 

```
Starting import
Add datasource
Add Template
Template will be linked to datasource /Kleintje/NewSchema.xsd
Commit successfull
Document template successfully compiled
Adding samples
Import done
```
- Open the template upon completion
- Buttons: < Back, Finish, Cancel

## 5 Template design basics

In this chapter, we show you the basics of template design, so that you can quickly create a simple template.

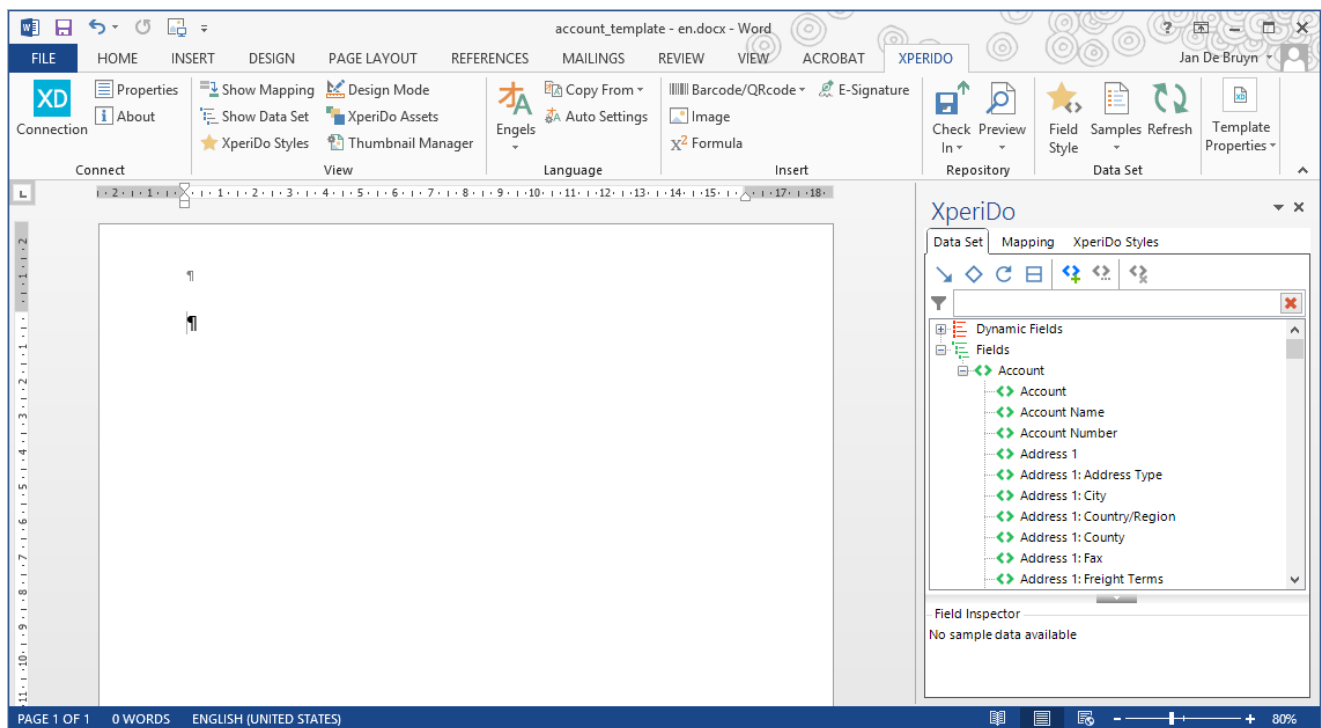
### 5.1 Content types

A template can contain both **static** and **dynamic** content.

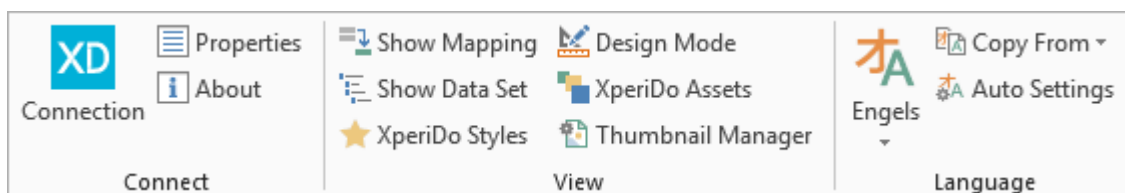
- **Static content** is regular Word content - anything you can insert without using the add-in. This type of content doesn't change in between documents.
- **Variable content** is data that is collected from other sources - this content is merged into the document when it is created.

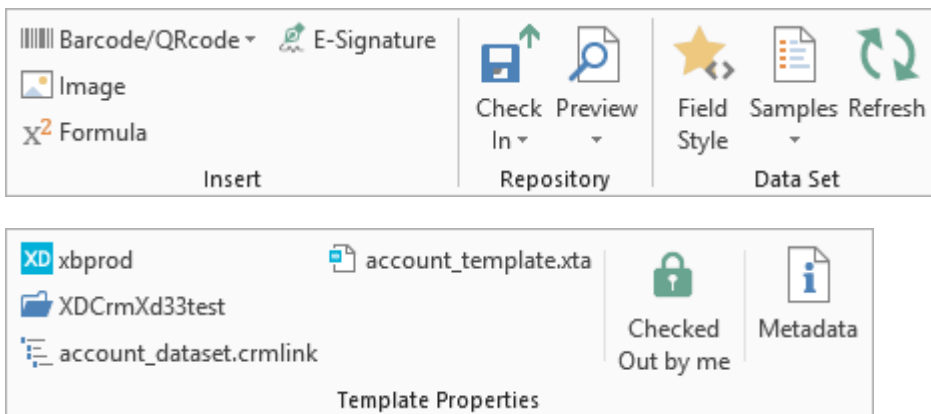
### 5.2 Screen layout

Upon opening a template, you'll see your document, the **XperiDo pane** and the **XperiDo ribbon**:



At the top, you can see the **XperiDo ribbon**. Here are its components:





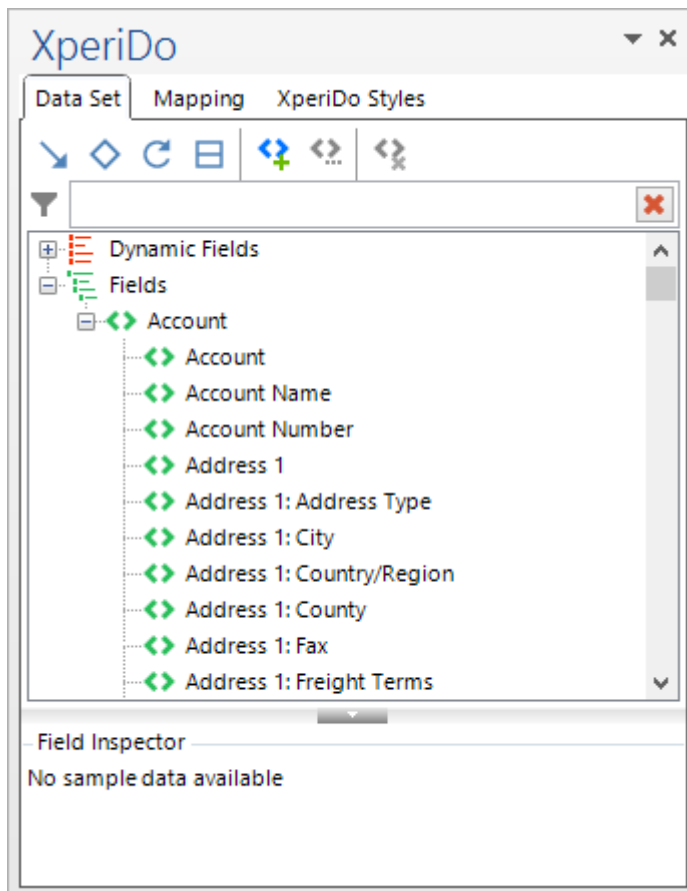
The ribbon gives you quick access to plenty of features XperiDo has to offer:

- **Connect:** used for connecting to the server, changing XperiDo's options and reviewing information about the XperiDo add-in.
- **View:** used to change the view of the XperiDo pane (on the right), opening the XperiDo assets manager, turning on design mode or viewing the thumbnail manager.
- **Language:** used to keep track of your template's language settings.
- **Insert:** used to insert various types of content in your template.
- **Repository:** used for generating previews and everything that has to do with revision control.
- **Data Set:** used for viewing samples, refreshing the data and selecting styles.
- **Template Properties:** provides you with information regarding the current template.

What every button does is explained in detail in the following chapters.

To the right, you can see the [XperiDo pane](#):








The pane is where you keep track of the variable content in your template:


- **Data Set:** contains a tree view of the data fields in the data source of the template. The **Field Inspector** at the bottom shows sample values for selected data fields.
- **Mapping:** contains a list of all the data mappings that are currently in the template.
- **XperiDo Styles:** contains a list of the quick formatting styles that you have defined for this template.

Again, detailed descriptions of how to use these tabs and their functions can be found further in the manual.

## 5.3 Types of fields

XperiDo works with four types of fields:

-  **Basic fields** are fields that are defined by the data set that is used to build the template on.
-  **Pseudo-fields** are extra fields that are not part of the data set. They can be used to perform calculations or apply formulas on basic fields. More information can be found [here](#).
-  **Dynamic fields** are extra fields for which an end user can set a value during the document creation process. More information can be found [here](#).

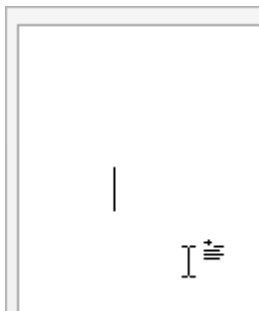
-  **Resultsets** are groups of fields that have a filter applied to them. More information can be found [here](#).

Pseudo-fields, dynamic fields and resultsets are the advanced fields you can use within XperiDo.

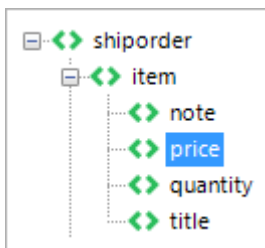
## 5.4 Mapping a field

Mapping a field from your dataset onto your template can be done by following these steps:

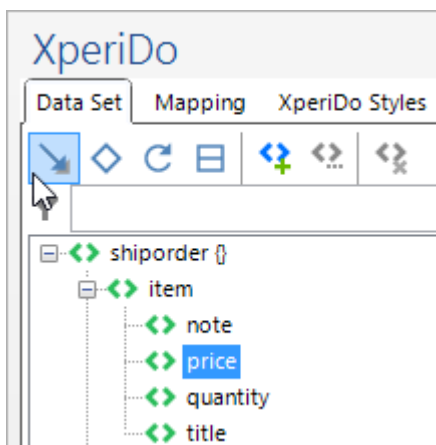
- 1) First, [place the cursor](#) at the spot in the document where you want the mapping to be:



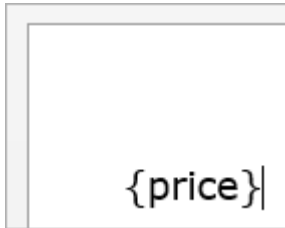
- 2) Next, select the [field](#) you want to map. To do this, click its name in the XperiDo pane:



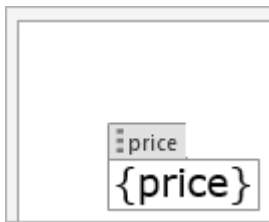
- 3) Then, you do one of the following: [double-click the selected field](#) in the XperiDo pane or click the [Data Field icon](#) in the XperiDo pane:



4) You'll see the mapping as follows:



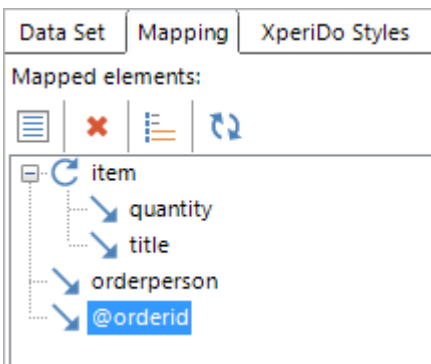
5) Around the mapping, a box will be placed to clearly show that this is a mapping:



When **previewing** a document or when **generating** a document, this mapping will be replaced by data.

## 5.5 Mapping overview

The mapping tab in the XperiDo pane shows you the mappings that are currently in the template. You can jump to any mapping by clicking it in the mapping tab. Inversely, if you click a mapping in your document, it will be highlighted in the mapping tab.

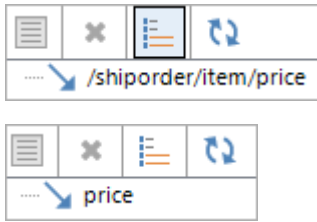


The mapping tab has four controls that you can use to manipulate the mappings in the template:



- **Settings:** adjust the settings of the selected mapping.
- **Delete:** delete the mapping.

- **Toggle View:** toggle between the full fieldname and the short fieldname view:

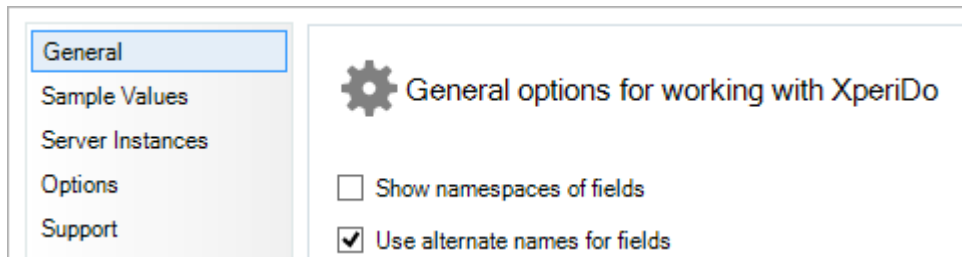


- **Refresh:** refresh the mappings.

## 5.6 Field names

A field in XperiDo can have multiple names. When using [XperiDo for Microsoft Dynamics CRM](#), each field has a **display** name, a **logical** name and a **schema** name. Behind the scenes, XperiDo always uses the schema name for fields.

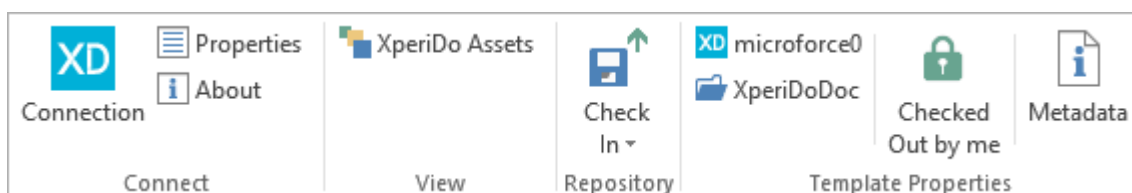
In the **mapping tab** of the XperiDo pane, the schema name is shown - but in the **data source tab** of the XperiDo pane, the display name is shown. This behaviour can be changed so that the data source tab shows the schema name. To do this, go to the [XperiDo options](#) by clicking **Properties** in the XperiDo ribbon. Then, in the general options, deselect **Use alternate names for fields**.



When creating a **dataset** in XperiDo for Microsoft Dynamics CRM, the display name of the fields is decided based on CRM's **UI language**. That means that, when you create a data set with your UI language set to Dutch, that Word will show these fields' names in Dutch (when available) in the data source tab. However, the mapping tab will still show the schema names, which are in English.

## 5.7 Templates without a data source

When you open a template that does not have a data set linked to it, the XperiDo ribbon looks a bit different:



As well as a simplified ribbon, the XperiDo pane is completely hidden since there is no data set and thus there are no mappings.

## 6 Revision control

When there are multiple template designers, it is counter-productive if some of them are working on the same template at the same time. They might overwrite each other's changes, so that neither makes any significant progress. To prevent that from happening, XperiDo features a revision control system.

### 6.1 Concept

The revision control system puts a **lock** on every template. When a template designer **checks out** a template for editing, he locks the template on it so that other template designers can no longer edit it until that same template designer checks the template back in, which releases the lock.

### 6.2 Opening a template

Depending on the state of the template, different options are available.

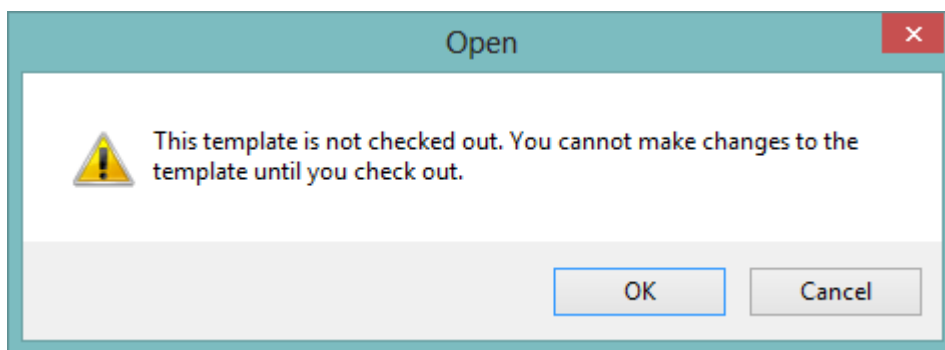
#### 6.2.1 *Opening an unlocked template*

When you select an unlocked template, you'll see the following icon at the top:



This lets you know that the template currently isn't locked by anyone, which means you can:

- **Open** it: this creates a local copy of the template on your machine, but the template stays unlocked because you **didn't check it out**. A warning message will inform you that any changes you make will not be saved unless you check out the template and check it back in to the server. **Open** is useful for when you want to view a template without editing it.



- **Open and check out**: this creates a local copy of the template on your machine, increases the version number and locks the template on the server so that no-one else can edit it while you're editing it. Use this if you want to make changes to the template.

If you intend on editing a template, it is advised to immediately check it out when opening it (by clicking [Open and check out](#)). But you can also open it, make changes, and check it out later.

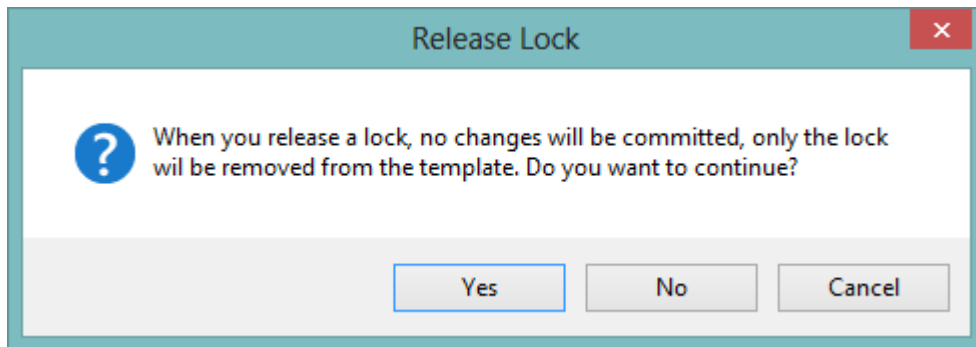
### 6.2.2 Opening a template that has been checked out by you

When you select a template that you have checked out, you'll see the following icon at the top:



This indicates that you have locked this template, which means that you can:

- **Open it:** this creates a local copy of the template on your machine and keeps the template locked so that only you can edit it.
- **Release the lock:** this releases the lock you have on the template. A warning message will inform you that no changes will be committed.



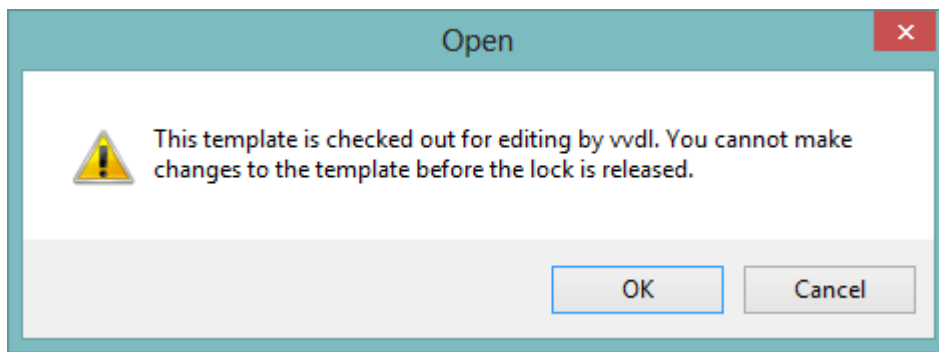
### 6.2.3 Opening a template that has been checked out by somebody else

When you select a template that someone else has checked out, you'll see the following icon at the top:

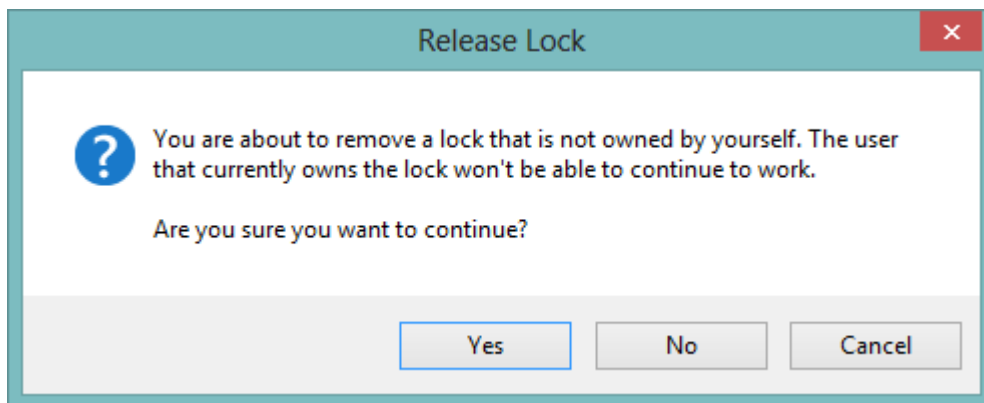


This indicates that someone else has locked this template, which means you can:

- **Open it:** this creates a local copy of the template on your machine. A warning message will inform you that any changes you make will not be saved unless the other person unlocks the template.

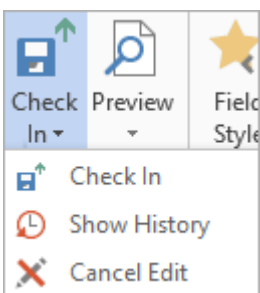


- **Release the lock:** this releases the lock the other person has on the template. A warning message will inform you that releasing someone else's lock will prevent them from continuing.



## 6.3 Options within a checked out template

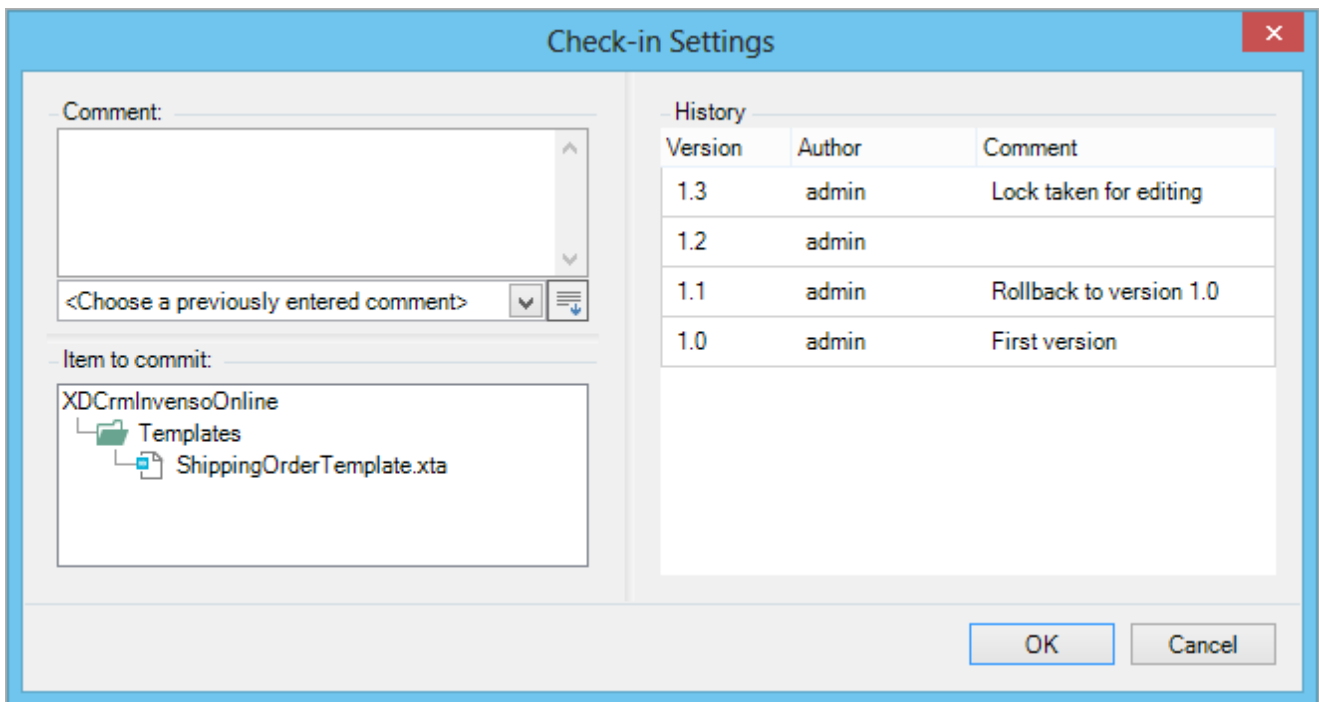
When working in a template that you've checked out, the following options are available:



### 6.3.1 Check in

This checks in the template to the central repository and unlocks it again. A window will pop up, allowing you to comment on the version you're checking in.

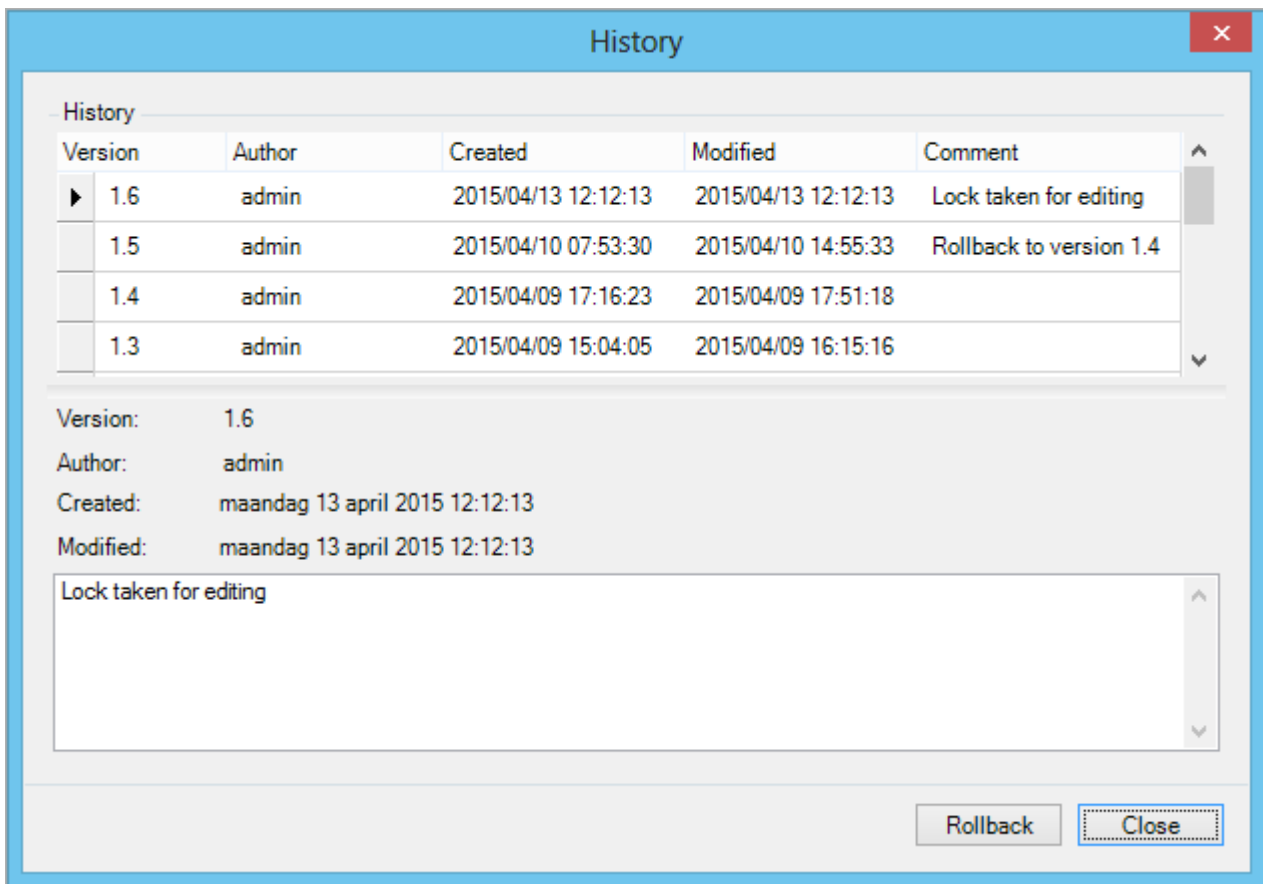




Under the comment box, you can also choose a [previously entered comment](#), or click the button next to it to [copy](#) the comment from the previous version. Click **OK** to check in the template. This updates the version on the server and unlocks it.

### 6.3.2 Show history

This brings up a window that shows the history of the template - who created what version, when and what they commented.



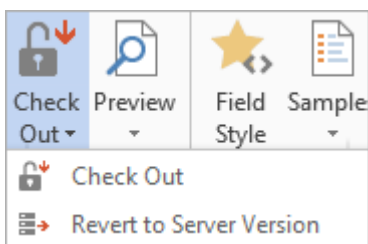
Click a version to select it. Then, you can click the [Rollback](#) button to change the content of the current version back to the content of the selected version. Note that no version is ever overwritten when rolling back, as rollback simply creates a new version and copies the content from the version you selected. This means that you can always roll back to any version that was checked in.

### 6.3.3 Cancel edit

This cancels the edits you've made so far. The current version will be abandoned and the template will be locked again, freeing it up for other template designers.

## 6.4 Options within an unlocked template

When working in a template that's unlocked, the following options are available:

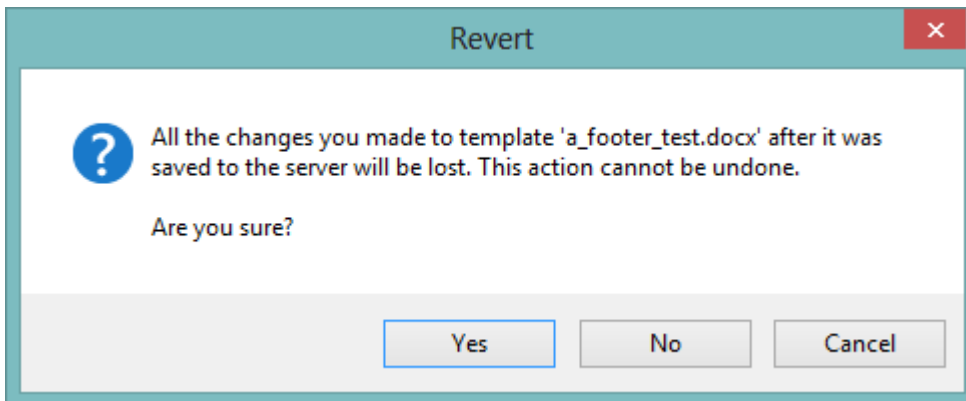


### 6.4.1 Check out

Lock the template on the server so no-one else can make changes to it. This also increases the version number of your local copy, so that the previous copy doesn't get overwritten.

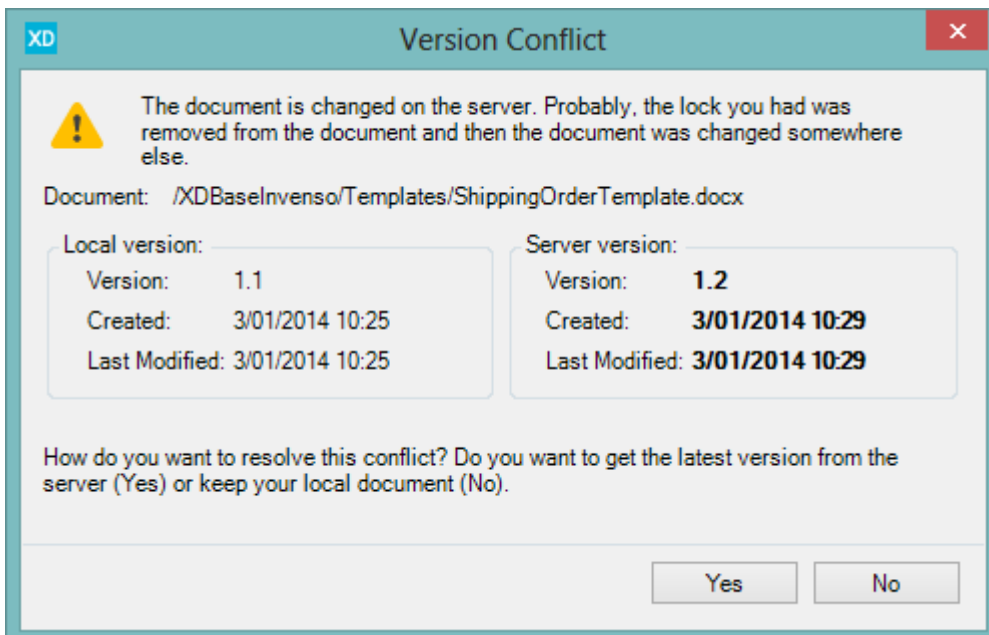
### 6.4.2 Revert to server version

This removes all the changes you've made since opening the template and reverts it back to the version found on the server. A warning message will inform you that you will lose your changes.



## 6.5 Administrator privileges

While unlikely, it is possible that an administrator locks or unlocks a template directly on the server while you have it opened. Should this occur, the following message will appear:



In this case, it is best to contact your system administrator and check with them what they changed and why. There usually is a good reason for the change, so we advise to click **Yes** so you get the latest version from the server.

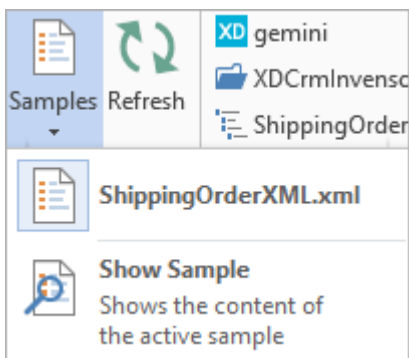
## 7 Previews

XperiDo allows you to preview the template you're making, so that you can check what your document will look like. This is a helpful tool during the template design process.

### 7.1 Samples

If you want to preview a template, there needs to be at least one sample attached to it. This is because a dataset doesn't contain data, it is merely a description of what data should look like. The actual data for the preview comes from the sample. This means that you can generate different previews from one template by using different samples.

To see whether a sample is attached to your template, click the [Samples](#) button in the XperiDo ribbon:

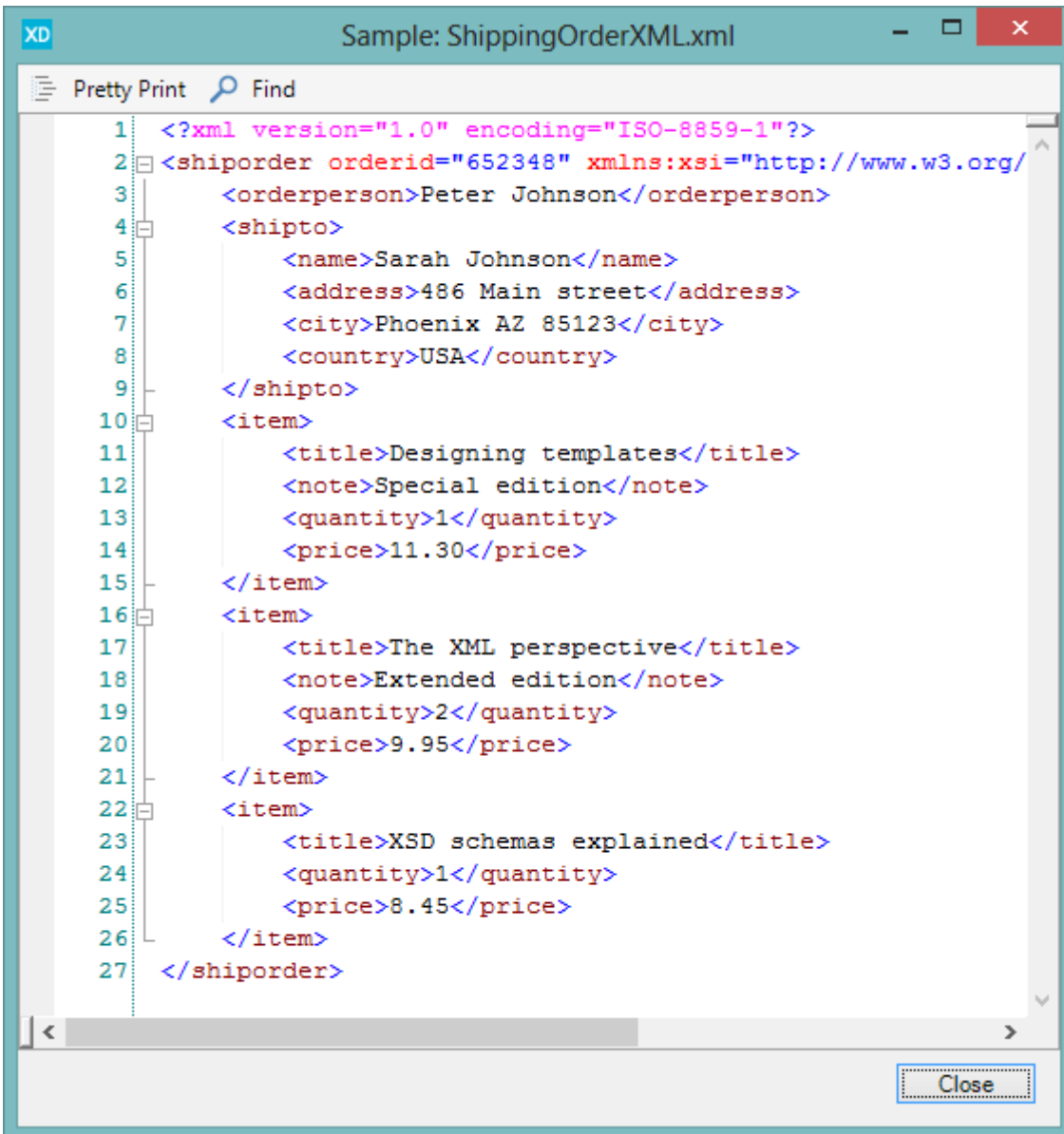


In the above image, there is one sample called [ShippingOrderXML.xml](#). The blue area around the icon next to the sample name shows that it is currently selected; this is always the case when there is only one available sample. If you have multiple samples, just click the one you want to use to select it.

There are two ways to review the content of a sample: the [Show sample](#) option and the [Field inspector](#).

#### 7.1.1 Show sample

Click [Show sample](#) in the [Samples](#) submenu to bring up the following window:

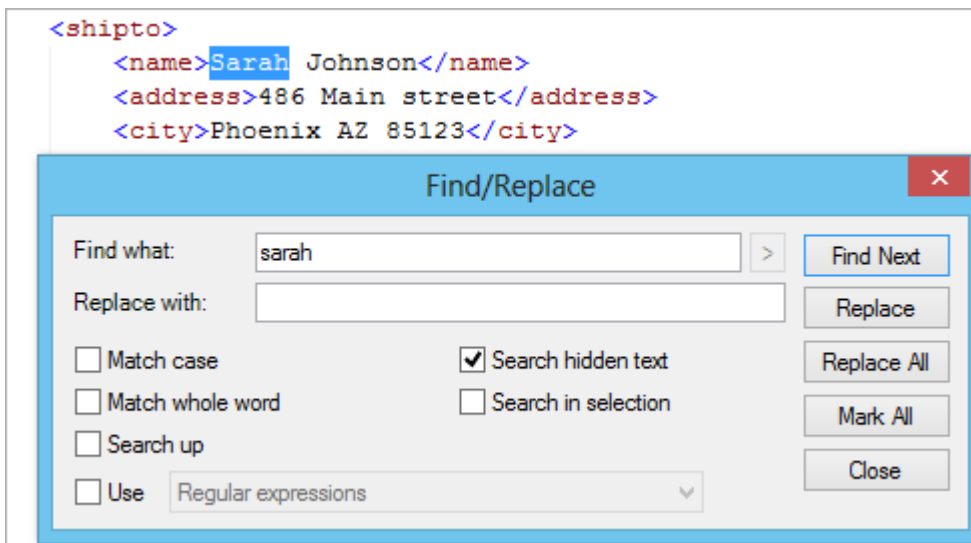


```

1  <?xml version="1.0" encoding="ISO-8859-1"?>
2  <shiporder orderid="652348" xmlns:xsi="http://www.w3.org/
3      <orderperson>Peter Johnson</orderperson>
4      <shipto>
5          <name>Sarah Johnson</name>
6          <address>486 Main street</address>
7          <city>Phoenix AZ 85123</city>
8          <country>USA</country>
9      </shipto>
10     <item>
11         <title>Designing templates</title>
12         <note>Special edition</note>
13         <quantity>1</quantity>
14         <price>11.30</price>
15     </item>
16     <item>
17         <title>The XML perspective</title>
18         <note>Extended edition</note>
19         <quantity>2</quantity>
20         <price>9.95</price>
21     </item>
22     <item>
23         <title>XSD schemas explained</title>
24         <quantity>1</quantity>
25         <price>8.45</price>
26     </item>
27 </shiporder>
  
```

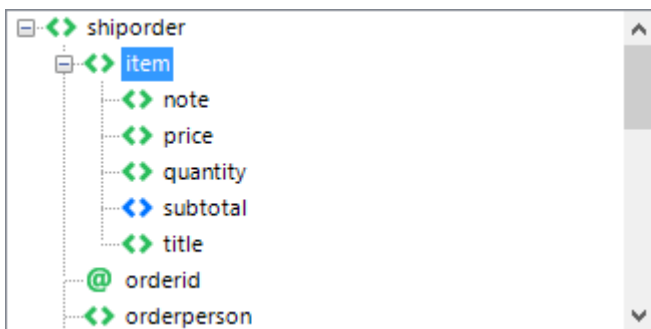
In this window, the content of the current sample is shown in [XML format](#). Should your XML not be formatted in a visually appealing way, you can click [Pretty Print](#) at the top to re-structure the XML.

If you have a very large sample and you are looking for something, it might be a good idea to use the [Find](#) button:

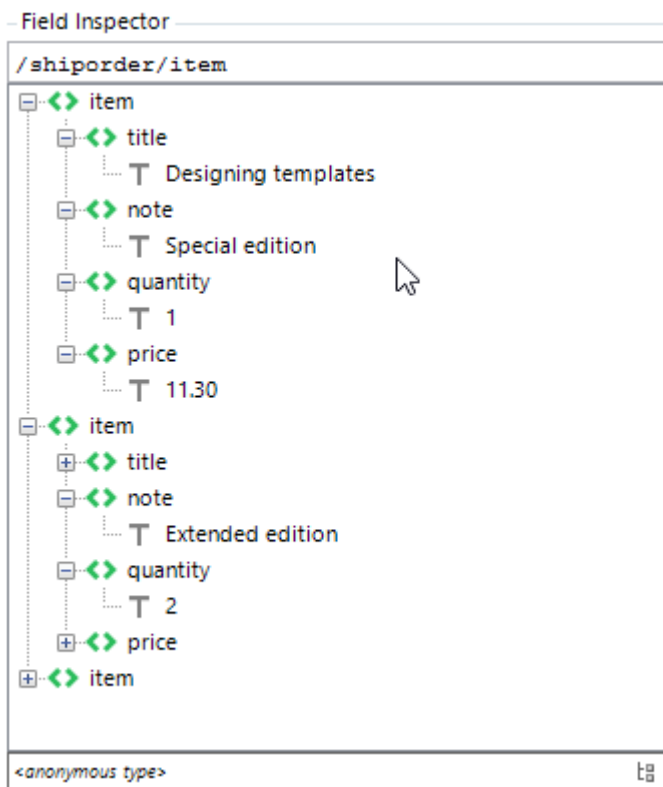


### 7.1.2 Field inspector

The **Field inspector** is a more user-friendly way of displaying the content of the current sample. First, click on a field in the datasource tab of the XperiDo pane:



Then, the **Field inspector** (below the datasource) shows the content of the selected element (and its children):



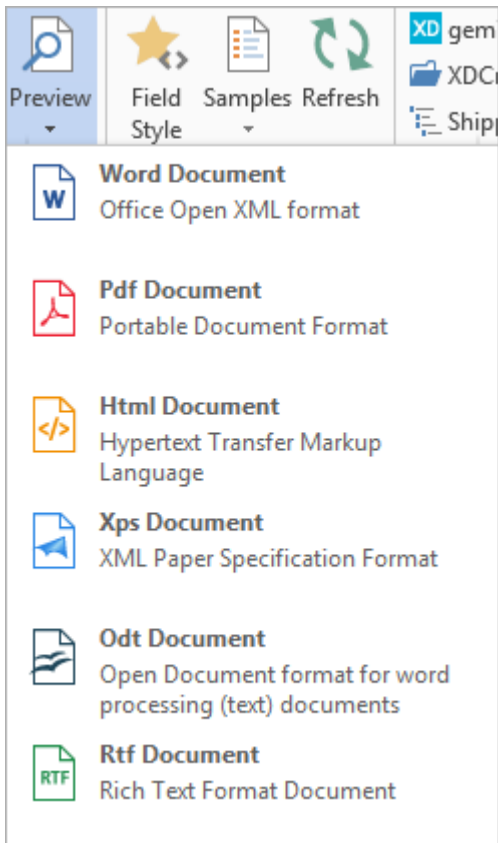
The Field inspector is a very easy way of checking whether you are mapping the correct field.

## 7.2 Previewing

If you want to preview your template, click [Preview](#) in the XperiDo ribbon:



Clicking the [lower part](#) of the button brings up the following dropdown:



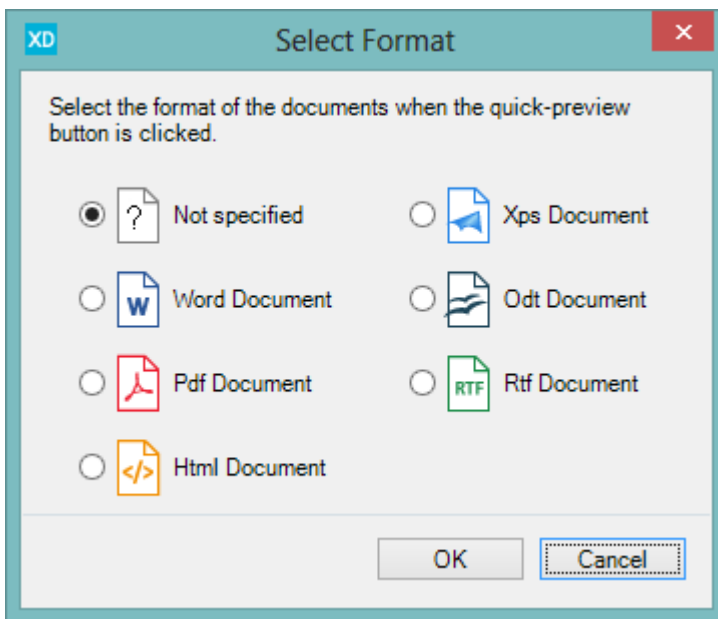
This dropdown asks you to choose the format for the resulting document. Click the format of your choice to generate the document.

You can also click the [upper part](#) of the button:

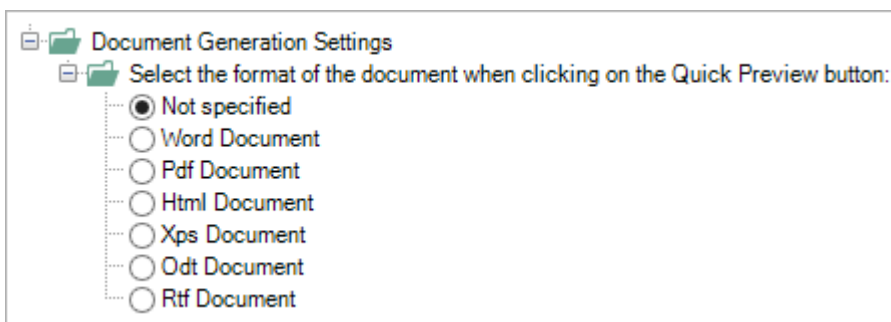


In this case, a window pops up:





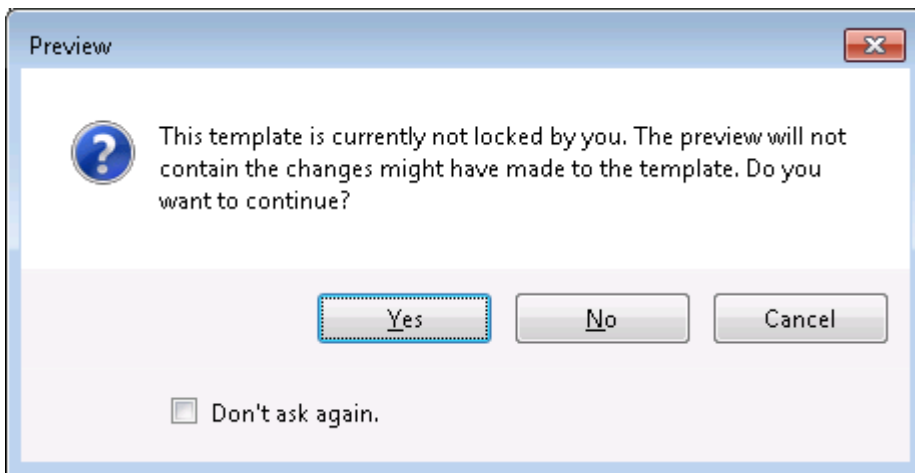
Here, you can choose the default format to use for the generated document. Selecting one here is the same as selecting a format in the [XperiDo options](#):



If you select a format, then clicking on the upper part of the [Preview](#) button automatically generates a document in the specified format.

### 7.2.1 *Previewing a template not locked by you*

When you try to preview a template that isn't locked by you, you will get the following warning:



While you are able to generate a preview, the preview will not contain the changes you might have made to the template.

### 7.3 Refreshing

Whenever a new or updated version of a data source, sample, template or asset is available on the server, it will not be automatically updated in the XperiDo add-in. For instance, updating a sample in XperiDo for Dynamics CRM doesn't automatically update the sample in the XperiDo add-in.

To update all of the items related to a template, click the [Refresh](#) button in the XperiDo ribbon:



Refreshing your template when you suspect changes to any of the related items is a good way of making sure that you're working with the latest version of the data source, sample etc.

## 8 Loops

Loops are one of the basic functions of the XperiDo add-in. With loops, you have the possibility to map a set of recurring items in a list. You can use loops when you have multiple items you want to show, such as a list of contacts, products or services.

### 8.1 Concept

Looping in XperiDo is done by following these steps:

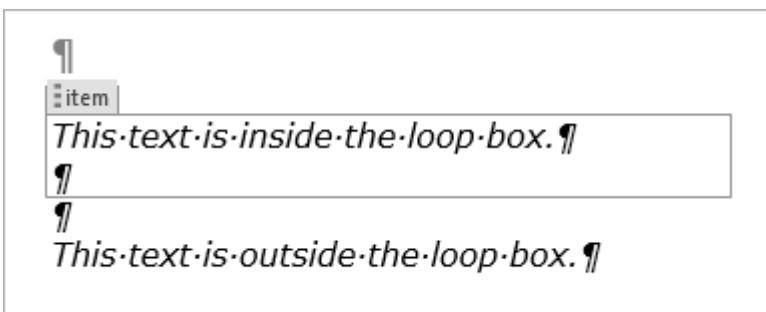
- 1) Select the **zone** to loop over.
- 2) Select the **recurring field** in your dataset.
- 3) **Finalize** the loop.

You can then further tweak the loop's settings.

#### 8.1.1 Loop box

When you create a loop in XperiDo, you are actually creating a **loop box**. A loop box designates the zone that should be repeated for every recurring element.

The following example shows a loop over the **item** field:

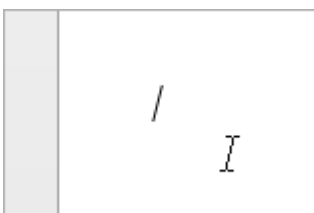


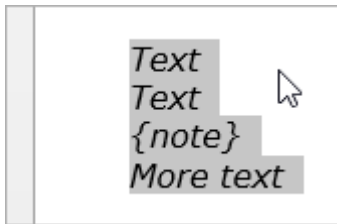
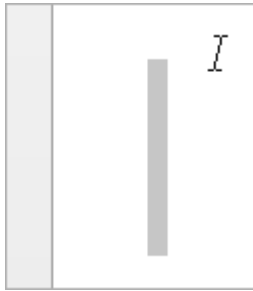
Everything inside the loop box is repeated. Mappings, tables, plain text, images - everything.

### 8.2 Creating a loop

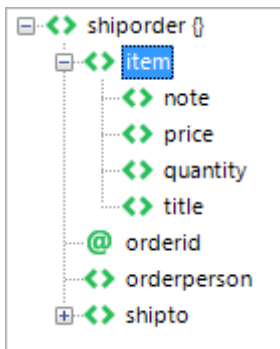
To create a loop, follow these steps:

- 1) Either place your cursor in the document, or highlight a zone.

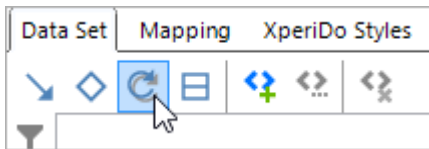




- 2) Select the element in your data set that you want to loop over. Note that this element must be recurring.

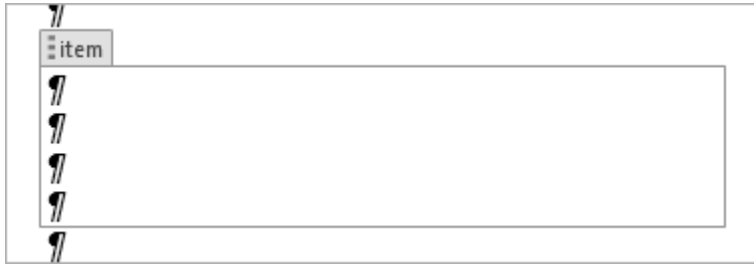


- 3) Click [Loop](#) in the XperiDo pane.



- 4) A loop box will now be inserted. If you just placed your cursor, it will be a one-line loop box. If you selected a zone, it will be a loop box that contains that zone.





Note that you do not have to select existing content around which to create a loop box - you can also add content to the box afterwards.

If you want to learn more about how to work with boxes, you can read [this article](#).

### 8.2.1 Continuity

You can affect the continuity between iterations by inserting the right symbol in the loop box. A few examples:

Putting a ¶ (pilcrow) inside the loop box...



...results in a new paragraph per iteration:



On the other hand, putting spaces in the loop box...



...results in spaces being put in between the iterations:



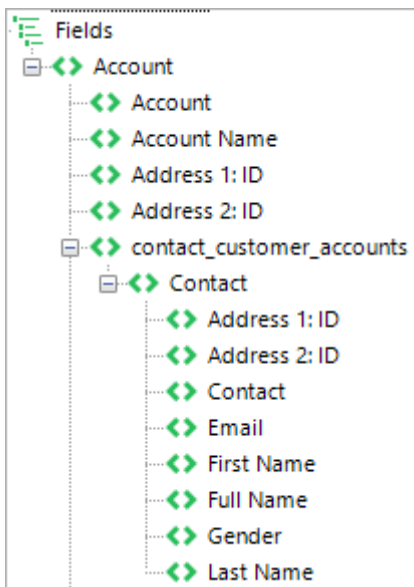
To achieve this, first create your loop, put your cursor behind it (or on the following line) and hit the **left** key on your keyboard until the cursor is in the loop box (you'll notice when the box becomes visible). Then you can insert your spaces.

If you plan on inserting a word, a comma or something similar, it might be a good idea to read [this article](#).

### 8.2.2 Selecting the correct field

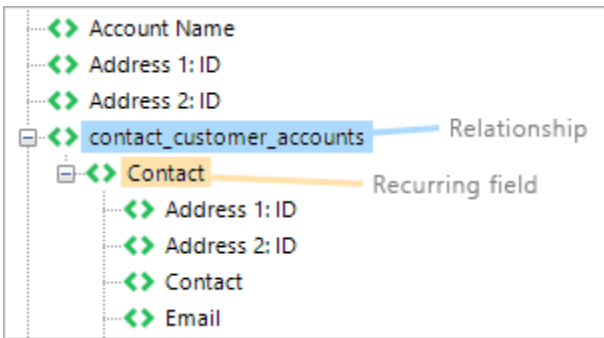
An oft-made mistake is selecting the wrong field, which results in the loop box content only being shown once - or not at all.

For instance, the following screenshot shows a data set that was created with [XperiDo for Microsoft Dynamics CRM](#):



This data set contains information about **one account** and **multiple contacts** associated with that account. The **Contact** field is recurring, so you can use it in your loops.

A level higher than the **Contact** field, we see the **contact\_customer\_accounts** field. This is actually a relationship field which binds the Account with its multiple Contacts:



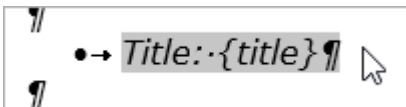
When you are choosing the field to loop over, it is important to select the recurring field and not the relationship field.

### 8.3 Common loop uses

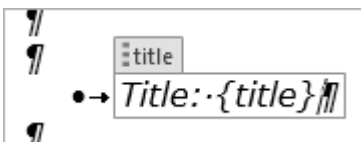
Because loops repeat a certain element, they are basically a kind of list. This makes them ideal to use in conjunction with bullet/numbered lists and tables.

#### 8.3.1 Bullet lists

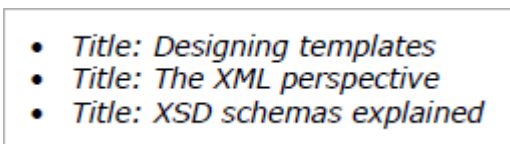
If you want to use a bullet list in your loops, you need to create a list with one item and select that as the zone to loop over, like in the following example:



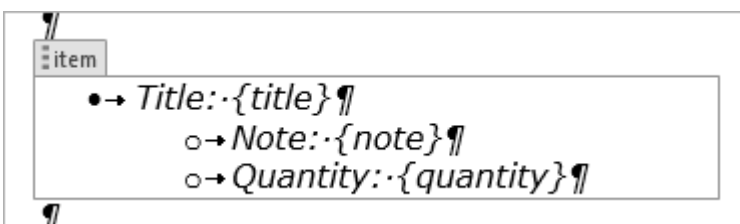
Then, clicking the loop icon results in this:



Here's what the document looks like:



You could go even further and multi-level lists:



This is the output:

- *Title: Designing templates*
  - *Note: Special edition*
  - *Quantity: 1*
- *Title: The XML perspective*
  - *Note: Extended edition*
  - *Quantity: 2*
- *Title: XSD schemas explained*
  - *Note:*
  - *Quantity: 1*

### 8.3.2 Numbered lists

Numbered lists work exactly the same as bullet lists. Create a list with one item and loop over that one item.

```

¶
¶
item
1.→Title:·{title}¶
¶
    
```

This is the output:

1. *Title: Designing templates*
2. *Title: The XML perspective*
3. *Title: XSD schemas explained*

Again, multi-level lists are no problem:

```

item
1.→Title:·{title}¶
  ○→Note:·{note}¶
  ○→Quantity:·{quantity}¶
¶
    
```

Here's the output:

1. *Title: Designing templates*
  - *Note: Special edition*
  - *Quantity: 1*
2. *Title: The XML perspective*
  - *Note: Extended edition*
  - *Quantity: 2*
3. *Title: XSD schemas explained*
  - *Note:*
  - *Quantity: 1*

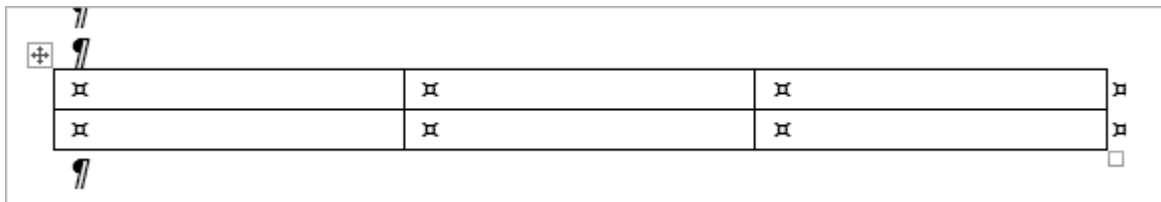
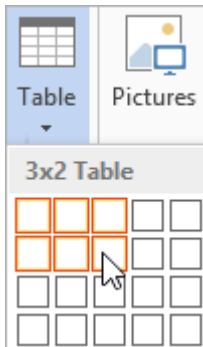


### 8.3.3 Tables

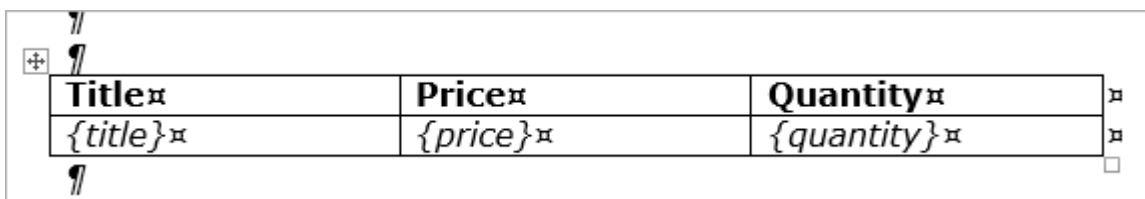
You can use Word tables to loop over table rows. Doing this adds a **table row** for each recurring element, which is a good way of presenting a list.

Follow these steps to loop over a table row:

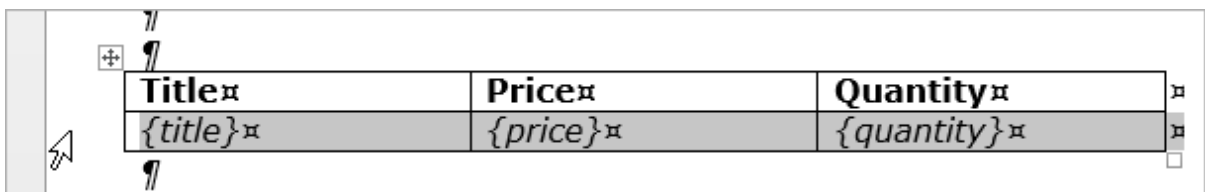
- 1) Create your table by using the standard Word table functionality. In this example, we've set up a 3x2 table.



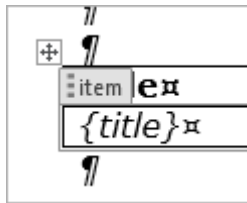
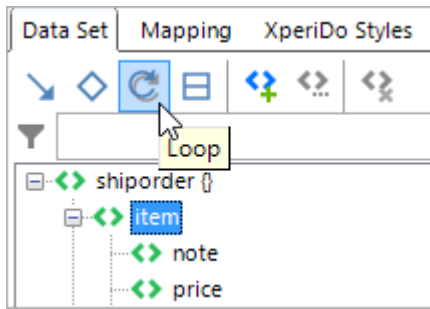
- 2) Insert your content. We've added **headers** in the first row and **mappings** in the second row.



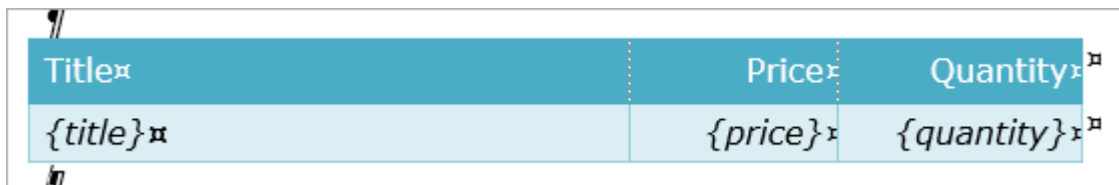
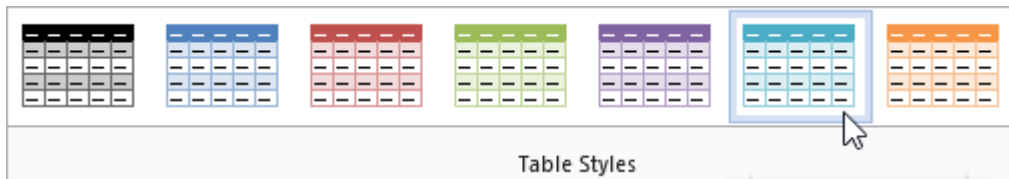
- 3) Select the entire second row. It is important that you select the entire row, you can be sure of this by clicking to the left of the row, at the position **where the mouse pointer changes**:



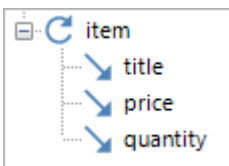
- 4) Select the field you want to loop over, then click **Loop**. You'll see that a loop box has been added.



- 5) Finally (and optionally), style the table and the elements in it. You can use [Word's table design tools](#) for this.



Now a loop over the row is in place. You can verify this in the [Mapping](#) tab of the XperiDo pane:



All that's left to do is see what the document looks like:

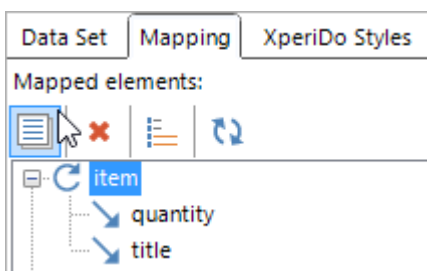
Title	Price	Quantity
<i>Designing templates</i>	€ 11,30	1
<i>The XML perspective</i>	€ 9,95	2
<i>XSD schemas explained</i>	€ 8,45	1

### 8.3.4 Looping without a recurring element

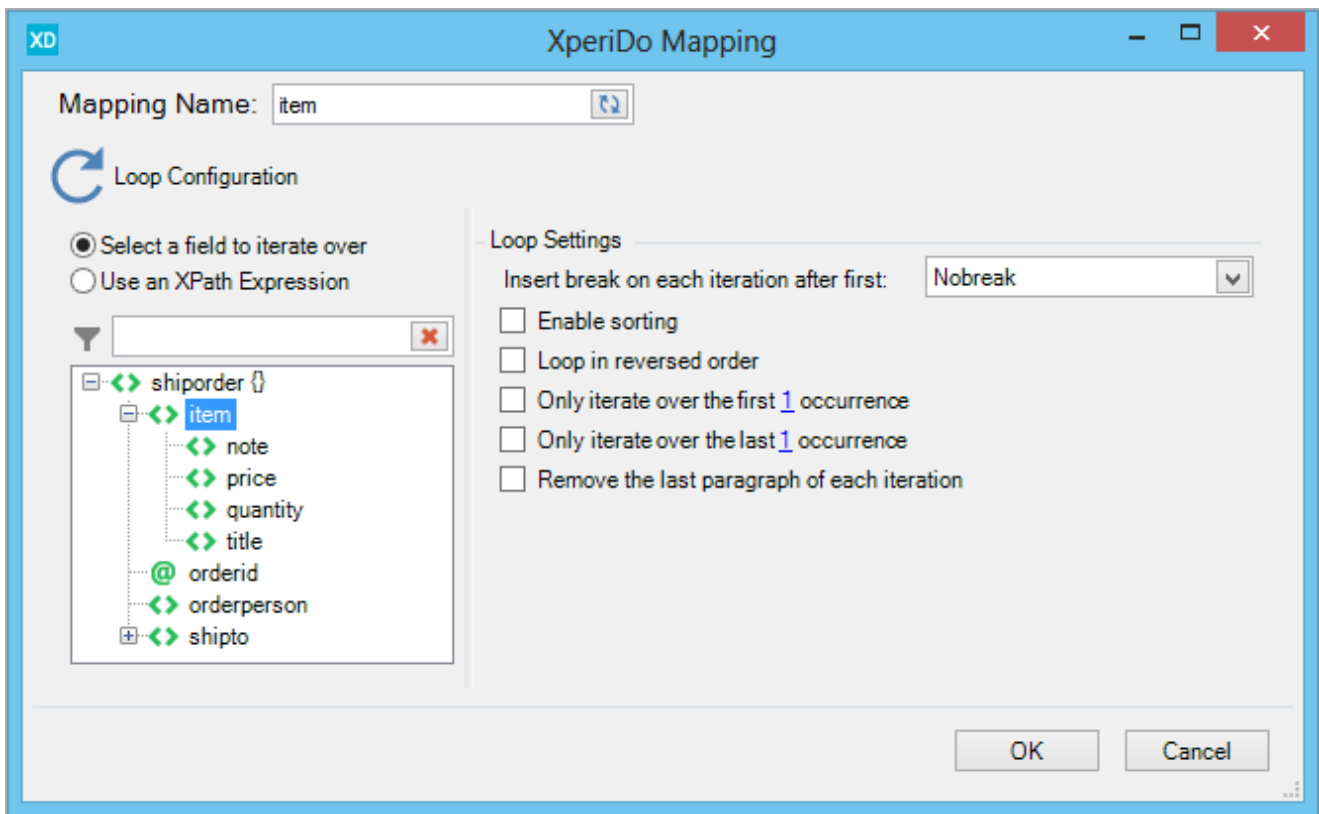
A less common way of looping (but still relevant) is looping a number of times without using a recurring element. You can read more about this [here](#).

## 8.4 Loop settings

You can customize a loop's settings to change its behaviour. To access these settings, select the loop in the **Mapping** tab and click **Settings**.



In the window that pops up, you can change the loop settings.



#### 8.4.1 Field vs XPath expression

On the left side of the window, you can change the field to loop over. The field that is selected here is the one that you selected before clicking [Loop](#).

Instead of using a field, you can use an [XPath expression](#). In rare cases, this can be useful - but this is usually reserved for very specific applications. More information about XPath can be found [here](#).

#### 8.4.2 Insert break on each iteration after first

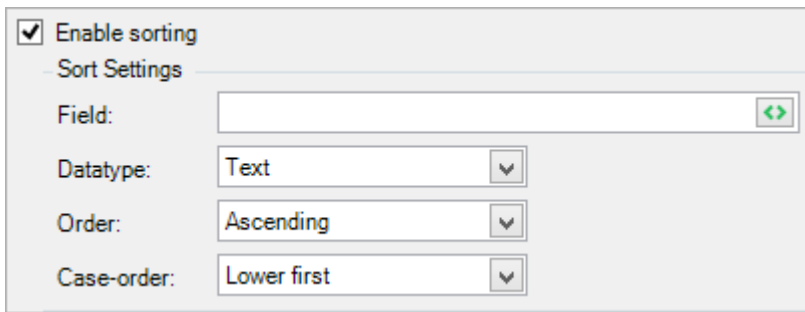
This setting affects the continuity between iterations of a loop. There are 4 settings:

- **Nobreak:** the next iteration is placed directly after the previous one.
- **Textwrapping:** the next iteration is placed on the next line, within the same paragraph.
- **Column:** the next iteration is placed in the next column. If there is no next column, it will be placed on the next page.
- **Page:** the next iteration is placed on the next page.

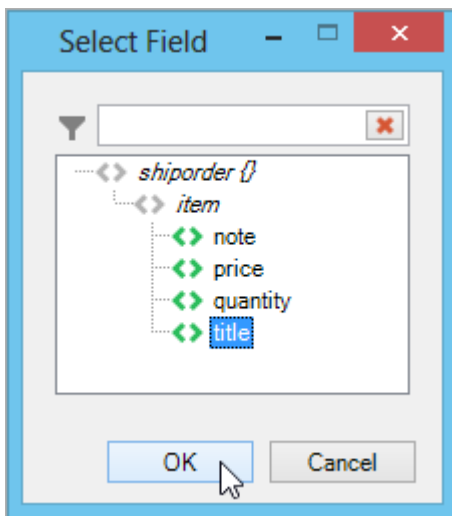
Note that you can affect the continuity yourself by putting a break symbol in the loop box. You can read more about this [here](#).

#### 8.4.3 Enable sorting

Enabling this setting allows you to sort your loop.



Sorting is done over a particular field, which you can select by clicking the button in the **Field** box. In the window that pops up, you select your field and click **OK**.



It is important that you choose the correct **Datatype**, as not every type reacts the same way to sorting. For instance, when sorting numbers as text, you'll end up with **1, 10, 2, 3** instead of **1, 2, 3, 10**.

The following options exist:

- **Text**: when your field is a text field (string).
- **Number**: when your field is a number (integer/float).
- **Date**: when your field is a date.
- **Time**: when your field is a time.
- **DateTime**: when your field is a date and a time.

You can also define the **Order** in which to sort (ascending or descending).

Finally, for text sorting, you can choose how case should be treated by changing the **Case-order** setting:

- **Upper first**: uppercase comes before lowercase.
- **Lower first**: lowercase comes before uppercase.
- **Ignore case**: lowercase and uppercase letters are treated equally.

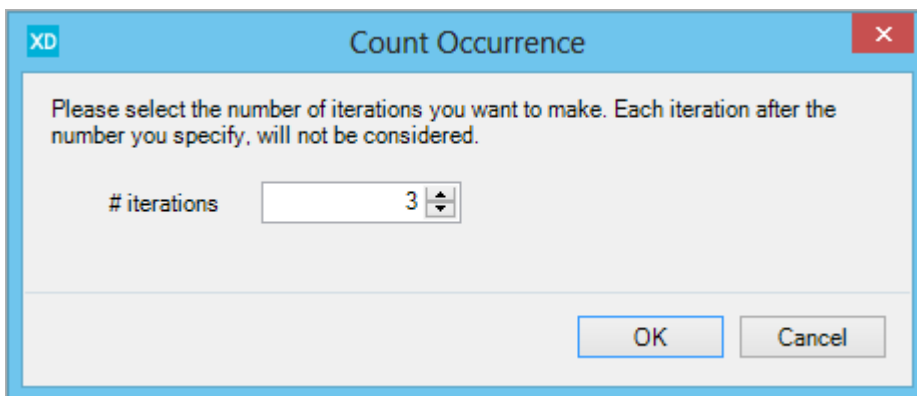
#### 8.4.4 Loop in reversed order

Enabling this setting reverses the order in which you loop.

#### 8.4.5 Only iterate over the first/last X occurrences

Enabling these settings allows you to only loop over a part of the recurring items. Click the number to bring up a window where you can change it:

Only iterate over the first 1 occurrence  
 Only iterate over the last 1 occurrence



#### 8.4.6 Remove the last paragraph of each iteration

Enabling this setting removes the last paragraph of each iteration.

#### 8.4.7 Precedence rules

When multiple options are selected, this is the order in which they are executed:

- 1) Loop in reversed order
- 2) Only iterate over the first/last X occurrences
- 3) Sorting

For instance, let's say that the set you want to loop over is (ABCD). Here's what happens:

- 1) Loop in reversed order: set becomes (DCBA)
- 2) Only iterate over the first 2 occurrences: set becomes (DC)
- 3) Sort descending: set becomes (CD)

## 9 Groups

Groups give you the power to display items in a loop in groups, instead of all together. This can be used for splitting content into e.g. product types, departments etc.

### 9.1 Concept

Grouping in XperiDo is done by following these steps:

- 1) Create a regular loop.
- 2) Select the **zone** to group over. The loop should be in this zone.
- 3) Select the field according to which you want to group the items. This is called the **grouping field**.
- 4) **Finalize** the group.

For instance, here's an ungrouped loop:

Description	Type	Quantity
Black Marker 3.5	marker	265
Paper Clip box 250	paper clip box	36
Red Marker 2.5	marker	30
Stapler 80K	stapler	18
Green Marker 2.5	marker	6
Paper Clip box 500	paper clip box	18
Stapler 110K	stapler	20

And here is the loop grouped according to **type**:

Description	Type	Quantity
Black Marker 3.5	marker	265
Red Marker 2.5	marker	30
Green Marker 2.5	marker	6
Paper Clip box 250	paper clip box	36
Paper Clip box 500	paper clip box	18
Stapler 80K	stapler	18
Stapler 110K	stapler	20

#### 9.1.1 Group box

When you create a group in XperiDo, you are actually creating a **group box**. A group box designates the zone that should be repeated for every different value the grouping field has.

There are typically two ways to use the group box: **embedded** or **separate**. The difference lies in the position of the group box.

### 9.1.1.1 Embedded

An **embedded group box** is a group box that is placed **directly** around the loop box. Let's explain this with an example.

The following is a 2-row table with a **loop box (in yellow)** over the second row. This sets up the table for looping over the second row:

Description	Type	Quantity
{description}	{type}	{quantity}

Creating a document from such a table will result in this:

Description	Type	Quantity
Black Marker 3.5	marker	265
Paper Clip box 250	paper clip box	36
Red Marker 2.5	marker	30
Stapler 80K	stapler	18
Green Marker 2.5	marker	6
Paper Clip box 500	paper clip box	18
Stapler 110K	stapler	20

If we now put an **embedded group box** in there (in blue), we get the following scenario:

Description	Type	Quantity
{description}	{type}	{quantity}

This is the output:

Description	Type	Quantity
Black Marker 3.5	marker	265
Red Marker 2.5	marker	30
Green Marker 2.5	marker	6
Paper Clip box 250	paper clip box	36
Paper Clip box 500	paper clip box	18
Stapler 80K	stapler	18
Stapler 110K	stapler	20

So, an embedded group box simply re-arranges the loop by grouping the items according to the grouping field.



An embedded group box is typically used when you want to sort a loop twice: once in the loop's settings and once using an embedded group box.

#### 9.1.1.2 Separate

A [separate group box](#) also works with a loop box, but it defines a larger area. The difference is that not just the loop will be grouped, but everything else inside the group box will also be repeated. Let's explain this with an example.

Here's a diagram of the table (loop box in yellow):

Description	Type	Quantity
{description}	{type}	{quantity}

And here's the table with a [separate group box](#) (in blue) which fully encapsulates the table:

Description	Type	Quantity
{description}	{type}	{quantity}

This results in the following:

Description	Type	Quantity
Black Marker 3.5	marker	265
Red Marker 2.5	marker	30
Green Marker 2.5	marker	6

Description	Type	Quantity
Paper Clip box 250	paper clip box	36
Paper Clip box 500	paper clip box	18

Description	Type	Quantity
Stapler 80K	stapler	18
Stapler 110K	stapler	20

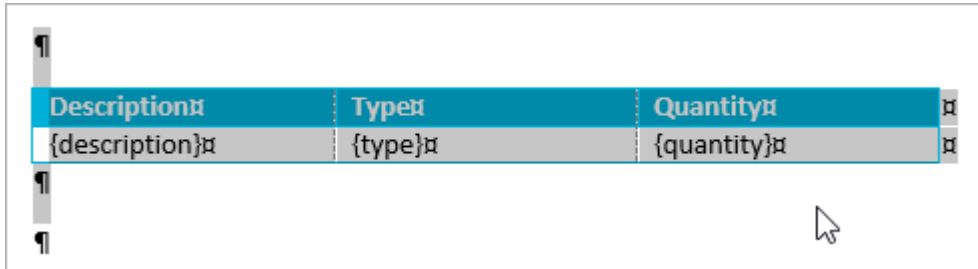
Because the group box included the entire table, the entire table is shown 3 times (since there are 3 types and [type](#) is the grouping field).

## 9.2 Creating a group

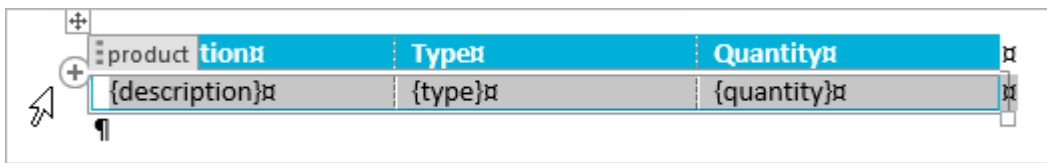
In order to create a valid group, you need to have a loop box ready around which you can create your group box.

So, once you've set up your loop, follow these steps to set up your group:

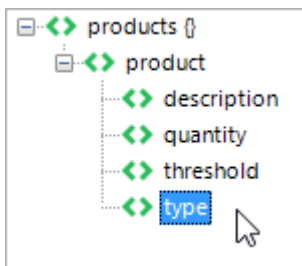
- 1) Select the zone that should be in your group box. Make sure to include the loop.



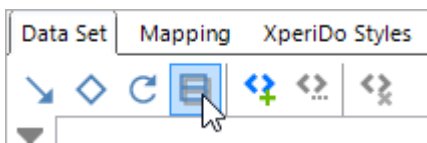
If you want to use an embedded group over a table row, be sure to select the row by hovering left to the row and clicking where the mouse pointer changes:



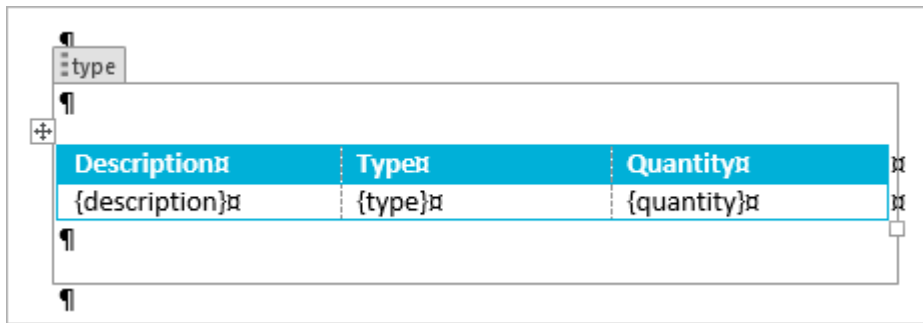
- 2) In your data set, select the **grouping field**, which is the field according to which you want to group the items.



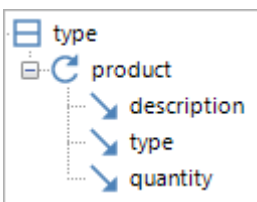
- 3) Click **Group** in the XperiDo pane.



- 4) A group box will now be inserted.



In the **Mapping** tab of the XperiDo pane, you'll see that the loop is inside the group.

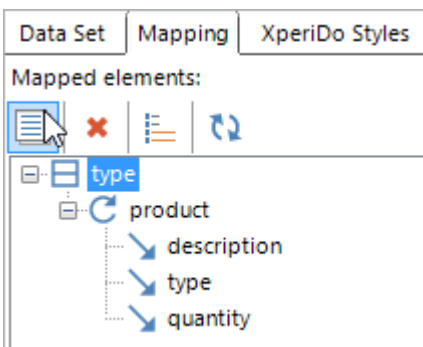


### 9.2.1 Working with boxes

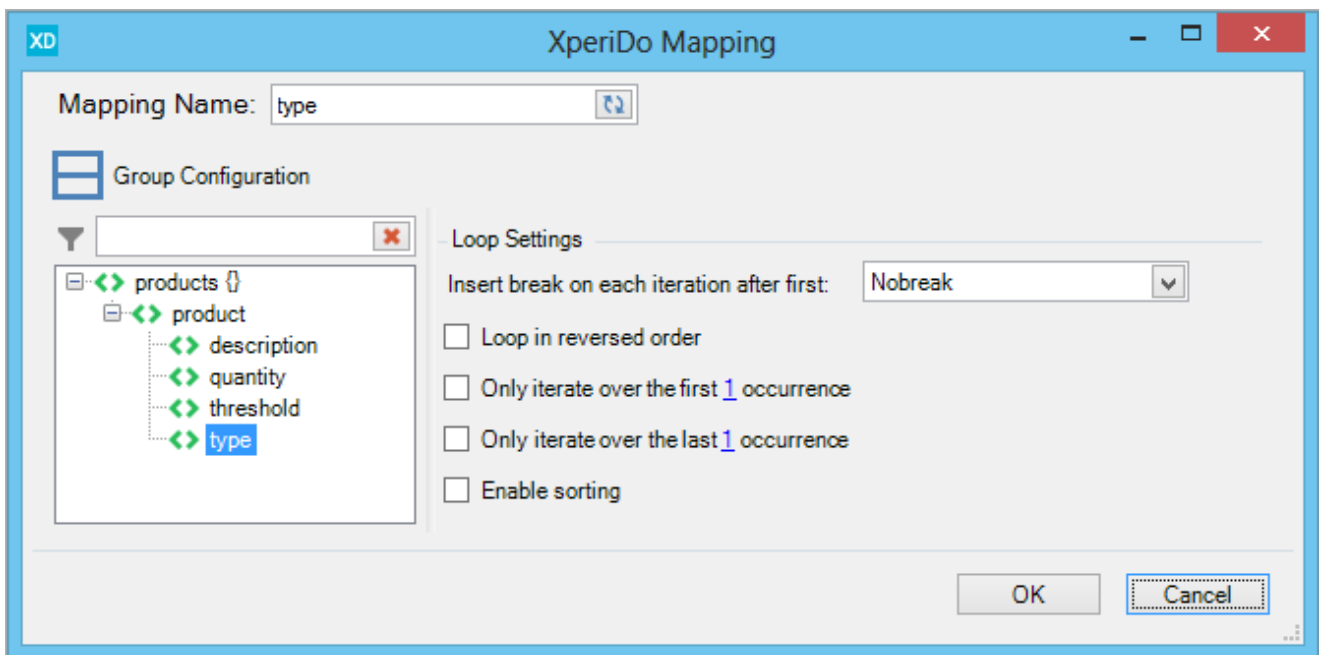
Since you're always using groups in combination with loops, it's a good idea to take a look at [this article](#), which explains how to work with boxes - loop boxes, group boxes etc.

## 9.3 Group settings

You can customize a group's settings to change its behaviour. To access these settings, select the group in the **Mapping** tab and click **Settings**.



In the window that pops up, you can change the group settings.



### 9.3.1 Insert break on each iteration after first

This setting affects the continuity between iterations of a group. There are 4 settings:

- **Nobreak:** the next iteration is placed directly after the previous one.
- **Textwrapping:** the next iteration is placed on the next line, within the same paragraph.
- **Column:** the next iteration is placed in the next column. If there is no next column, it will be placed on the next page.
- **Page:** the next iteration is placed on the next page.

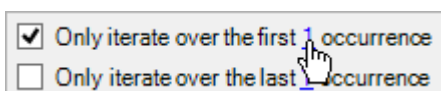
Note that you can affect the continuity yourself by putting a break symbol in the group box. You can read more about this [here](#) (written for loops, but the same principle applies to group boxes).

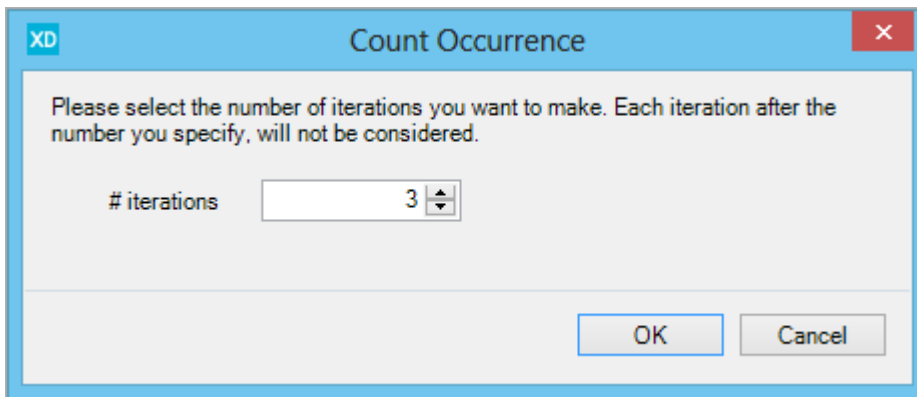
### 9.3.2 Loop in reversed order

Enabling this setting reverses the order in which you loop the group.

### 9.3.3 Only iterate over the first/last X occurrences

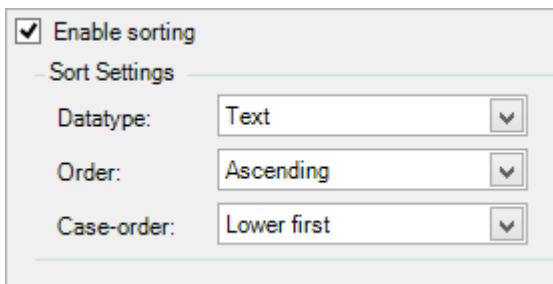
Enabling these settings allows you to only group a part of the recurring items. Click the number to bring up a window where you can change it:





### 9.3.4 Enable sorting

Enabling this setting allows you to sort your group.



It is important that you choose the correct **Datatype**, as not every type reacts the same way to sorting. For instance, when sorting numbers as text, you'll end up with **1, 10, 2, 3** instead of **1, 2, 3, 10**.

The following options exist:

- **Text**: when your field is a text field (string).
- **Number**: when your field is a number (integer/float).
- **Date**: when your field is a date.
- **Time**: when your field is a time.
- **DateTime**: when your field is a date and a time.

You can also define the **Order** in which to sort (ascending or descending).

Finally, for text sorting, you can choose how case should be treated by changing the **Case-order** setting:

- **Upper first**: uppercase comes before lowercase.
- **Lower first**: lowercase comes before uppercase.
- **Ignore case**: lowercase and uppercase letters are treated equally.

## 10 Formatting

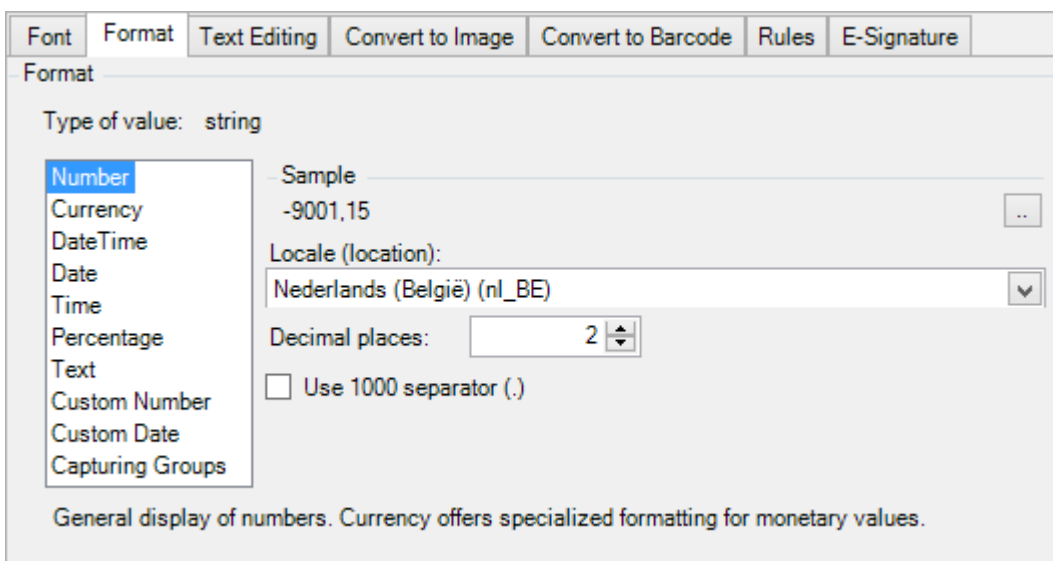
When working with data, it is important that that data is formatted correctly - otherwise it might get interpreted incorrectly. To make sure that your data is formatted the way you want it to be, XperiDo has plenty of formatting options.

### 10.1 Concept

When a field is mapped, you can [format](#) it to alter the content. You can turn the field into a number, data, time, an image, a barcode, a hyperlink, an e-signature... All of these change the original mapping's content to something else - that's [formatting](#).

#### 10.1.1 The XperiDo Mapping window

The [XperiDo Mapping window](#) is where you apply formatting to your mapping. Double-click a mapping in the [Mapping](#) tab of the XperiDo pane (or select a mapping and click [Settings](#)) to bring it up. Here's the formatting part of that window:

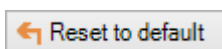


We'll go over all the tabs (Font, Format etc.) in this chapter.

The other parts of the XperiDo Mapping window are explained in the [Conditional content chapter](#).

#### 10.1.2 Reset to default

If you want to reset your mapping's settings to the default values, you can click the [Reset to default](#) button:



## 10.2 Font

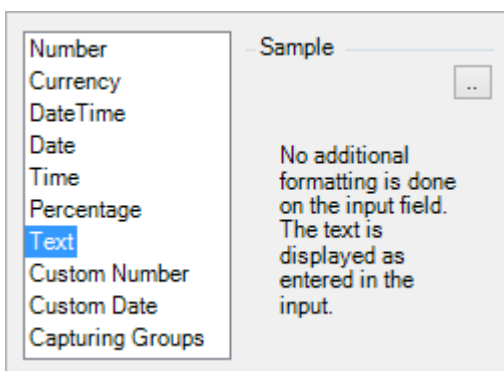
This tab can be used to style your mapping. You can change the font, color, weight etc.

You can find more information about this tab in the [Styling chapter](#).

## 10.3 Format

This tab can be used to change the data type of your field. You can convert your field into a number, currency, date, time, percentage, text or any custom type.

By default, all fields are interpreted as [text](#):



Note that displaying numbers as text may make them appear correct, but that you'll need to convert them to numbers/currencies if you want to use them in calculations.

### 10.3.1 Numbers, times & dates

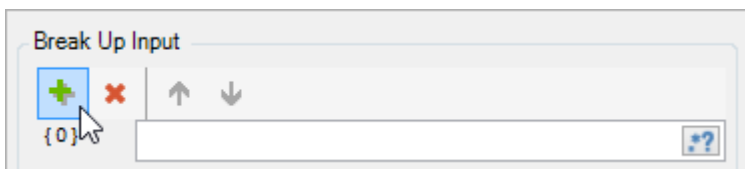
How the number, time and date formats work is covered in the [Numbers & dates chapter](#).

### 10.3.2 Capturing groups

Capturing groups can be used to disassemble a field into groups, after which you can choose which of those groups to show and in which order.

#### 10.3.2.1 Creating, moving and removing groups

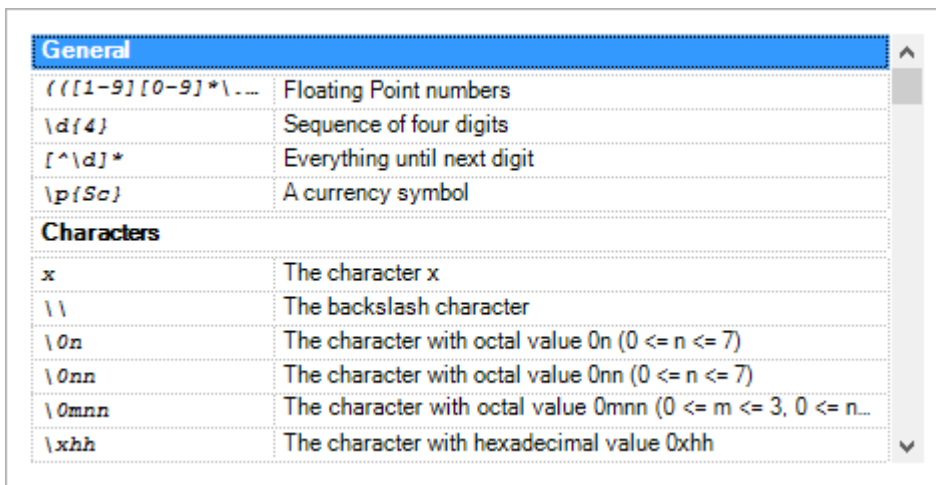
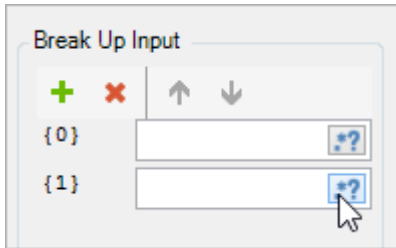
First, you need to create your groups. Click the [green plus](#) to add a new group:



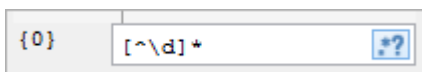
You can add more groups by clicking the [green plus](#). Select a group and click the [red X](#) to remove a group. Finally, you can move a group up or down the list by selecting it and clicking the [up](#) or [down arrows](#).

### 10.3.2.2 Defining groups

Now that you've created your groups, you need to define them. Click the `.*?` button in a group's text box to bring up a list of regular expressions which you can use to define your group:

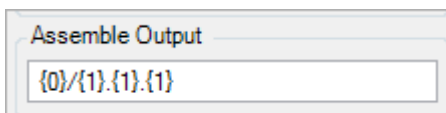


You can select one the expressions ([this page](#) has more information about regular expressions) and click **OK** to insert it, or you can type it in yourself in the text box:



### 10.3.2.3 Setting the output

Once you've set up and defined your groups, you can decide how to output them. You can type in the group identifiers (such as `{0}`) and other characters in the **Assemble Output** text box:

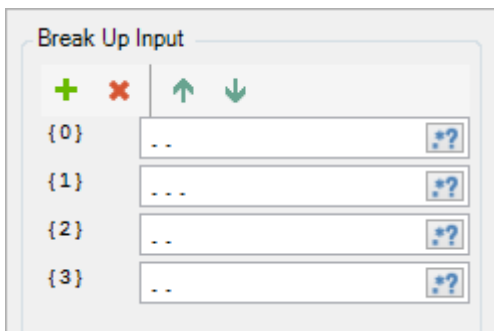


For instance, if **group {0}** contains **A**, **group {1}** contains **B** and the output is set as in the above screenshot, then this will be the output: **A/B.B.B**.

### 10.3.2.4 Example

Capturing groups is a powerful feature, but it can get quite complex - so let's use a real-life example. Take the following setup, which we use for formatting a telephone number:





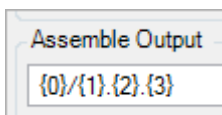
This setup defines 4 groups with the following rules:

- Group {0} contains the first 2 characters of the mapping's content (a dot means any character).
- Group {1} contains the following 3 characters.
- Group {2} contains the following 2 characters.
- Group {3} contains the following 2 characters.

The telephone number that we want to format is **047770123**. This means that the groups will contain the following:

- Group {0}: 04
- Group {1}: 777
- Group {2}: 01
- Group {3}: 23

Finally, here's how we set up our output:



This results in the following output: **04/777.01.23**

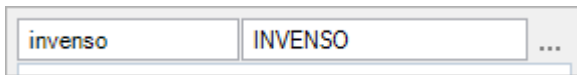
Formatting telephone numbers is only one very basic example, but this should give you an idea of what is possible with capturing groups.

## 10.4 Text editing

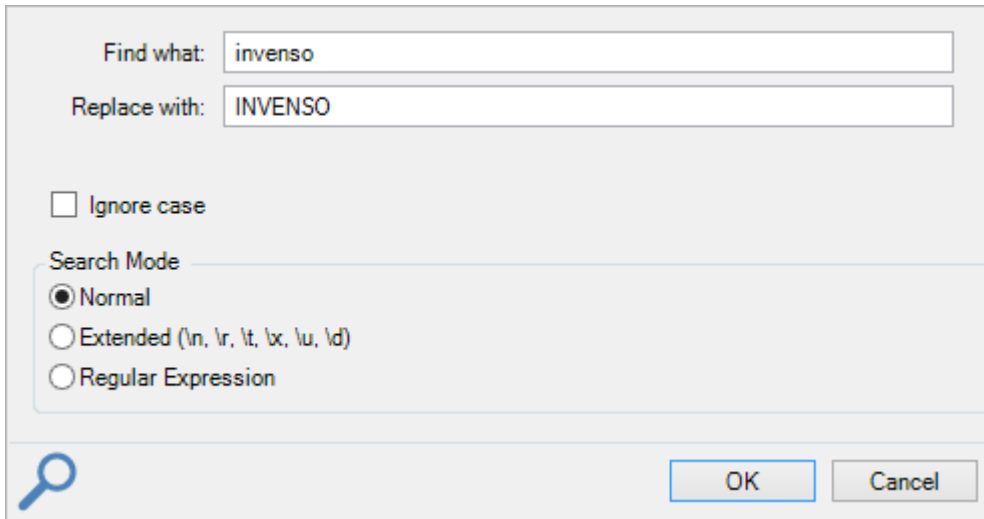
This tab can be used to **replace** parts of your text, or to **insert** parts into your text.

### 10.4.1 Replacing text

To replace part of your text, type the part you wish to replace in the **left text box**, and the part you wish to replace it with in the **right text box**:



This example will replace all lowercase occurrences of invenso with INVENSO. Click the [ellipsis \(...\)](#) to bring up more options:



In here, you can change some settings:

- [Ignore case](#): check this if you want to treat lowercase and uppercase letters the same. When this is checked, there is no difference between BLUE, blue, bLUe, Blue etc.
- [Normal search mode](#): the text is considered to be plain text without special characters.
- [Extended search mode](#): this allows the insertion of special characters in the text. [This wikipedia page](#) has more information about special characters.
- [Regular Expression search mode](#): this treats the text as a regular expression. [This page](#) has more information about regular expressions.

Click [OK](#) to save the settings for that text replacement.

After you've set up the text replacement, click the [green plus](#) to add it to the list:

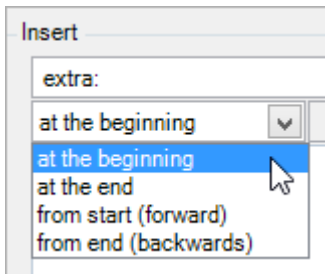


You can add multiple text replacements and move the order in which they are checked by selecting one of them and clicking the [up](#) and [down](#) arrows. If you want to remove a text replacement, select it and click the [red X](#). Finally, you can update a text replacement by selecting it, changing the text/settings and clicking the [update](#) button:



### 10.4.2 Inserting text

To insert text, type the text you want to insert in the **text box**, choose the **position** where you want to insert it and click the **green plus**:



This adds the text insert to the list of text inserts.

There are multiple positions to insert your text:

- **At the beginning:** the typed text is inserted at the beginning of the field's text.
- **At the end:** the typed text is added to the end of the field's text.
- **From start (forwards):** the typed text is added in the position you specify to the right. 0 is at the beginning, 1 is after the first character etc.
- **From end (backwards):** the typed text is added in the position you specify to the right. 0 is at the end, 1 is before the last character etc.

You can add multiple text inserts and move the order in which they are checked by selecting one of them and clicking the **up** and **down** arrows. If you want to remove a text insert, select it and click the **red X**. Finally, you can update a text insert by selecting it, changing the text/settings and clicking the **update** button:



## 10.5 Convert to image/barcode

These tabs can be used to convert your mapping into an image or a barcode.

You can find more information about this tab in the Images & Barcodes chapter.

## 10.6 Rules

This tab can be used for setting various rules that impact the formatting of your mapping.

### 10.6.1 Removing blank paragraphs

Check the box **Remove the paragraph this mapping is in when the value is not specified or blank** if you want to prevent blank lines from appearing in this mapping.

Remove the paragraph this mapping is in when the value is not specified or blank.

For instance, this is very useful when dealing with addresses. Typically, addresses are input in address lines, but not every line is always used:

250 North Main Street

Memphis TN 38103

United States

Turning on this setting fixes this:

250 North Main Street

Memphis TN 38103

United States

### 10.6.2 Creating hyperlinks

Check the box **Create a hyperlink** to render your mapping as a clickable hyperlink. The mapping will still contain whatever is in it, but you can define a URL that links to when you click it.

Create a hyperlink

Hyperlink Target:

Tooltip:

Insert the URL that you want to go to in the **Hyperlink Target** text box, or click the **button** in the text box to insert a field's value for the hyperlink target.

You can change what is shown when hovering over the link in the **Tooltip** text box. You can insert a field's value by clicking the **button** in the text box.

#### 10.6.2.1 E-mail hyperlink

If you want to create an e-mail hyperlink, follow these steps:

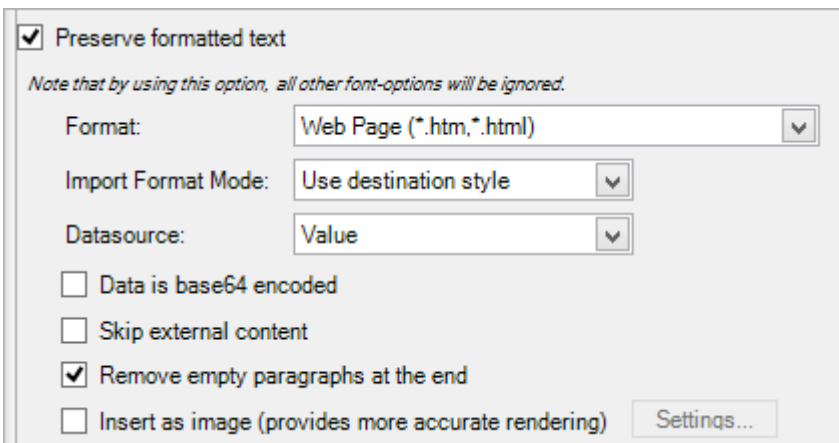
- 1) Create a pseudo-field of type **Text**.
- 2) Give it the value `concat('mailto://',{field with link})`, where `{field with link}` is the field that contains the link. Insert this by dragging it from the data set.
- 3) Then, use this created field as the **Hyperlink Target** by selecting it from the data set after clicking the **button** inside the Hyperlink Target text box.

By adding the `mailto://`, the field is specified to be an e-mail link.

### 10.6.3 Preserving formatted text

Check the box **Preserve formatted text** to keep the field's original text formatting. This is very useful for e.g. including HTML text, or entire docx files. These types of content have formatting applied to them, which might lead to XperiDo misinterpreting this formatting.

Note that activating this setting causes Word's and XperiDo's font settings to be ignored. For more information, please read this article.



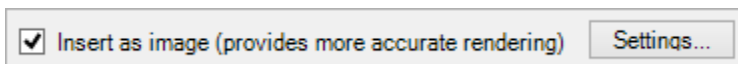
Once activated, more settings appear:

- **Format:** The format in which the original content is. We strongly advise you to find the right format before trying the **Auto** setting.
- **Import Format mode:** what to do with the styles that are used in the formatted data (only applies to formats that support styles, such as Word formats).
  - **Use destination styles** means that your current template's Word styles will overwrite the ones found in the original content.
  - **Keep source formatting** keeps the original styles intact.
- **Datasource:** the data type of the value of the mapped field. The following values are available:
  - **Value:** this treats the value of the mapped field as plain text.
  - **Fileshare:** this treats the value of the mapped field as a link to a file, relative to the XperiDo server. You can use this to get the data from files on the XperiDo server. If you use this option, know that

you need to specify the path in between [apostrophes](#) and by using [forward slashes](#), like this example: `'c:/temp/file.doc'`.

- [Repository](#): this treats the value of the mapped field as a link to a file in the XperiDo repository. For instance, `/Project/Group/File.docx`.
- [URL](#): this treats the value of the mapped field as a URL. You can use this to get the content of a web page.
- [Data is base64 encoded](#): check this when the data is base64 encoded.
- [Skip external content](#): checking this prevents XperiDo from waiting on web content that doesn't load by skipping its content. For instance, when including a Word file that has links to images on a website, this setting would not let XperiDo wait until the images are retrieved - the cached versions will be used.
- [Remove empty paragraphs at the end](#): check this if you want to remove empty paragraphs at the end.

Finally, there's one more setting, [Insert as image](#).

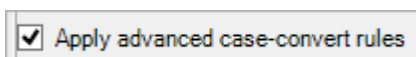


This setting can be used when you want to insert the content as an image rather than text. This is especially useful for inserting PDF files, as you cannot insert their content as text.

Checking this setting opens up another [Settings](#) button. Clicking that brings up a window where you can adjust the image's position, size, text wrapping etc. like you can do with regular Word images.

#### 10.6.4 Converting case

Check the box [Apply advanced case-convert rules](#) to change the casing of certain letters in a text.



The following options are available:

- [Don't change](#): the text stays as it is.
- [Sentence case](#): everything is converted to lowercase, except the first letter and every letter following a dot.
- [lowercase](#): everything is converted to lowercase.
- [UPPERCASE](#): everything is converted to uppercase.
- [Capitalize Each Word](#): everything is converted to lowercase except the first letter of each word.
- [tOGGLE cASE](#): invert the case of each character.

## 10.7 E-signature

This tab can be used to convert your mapping into an electronic signature.

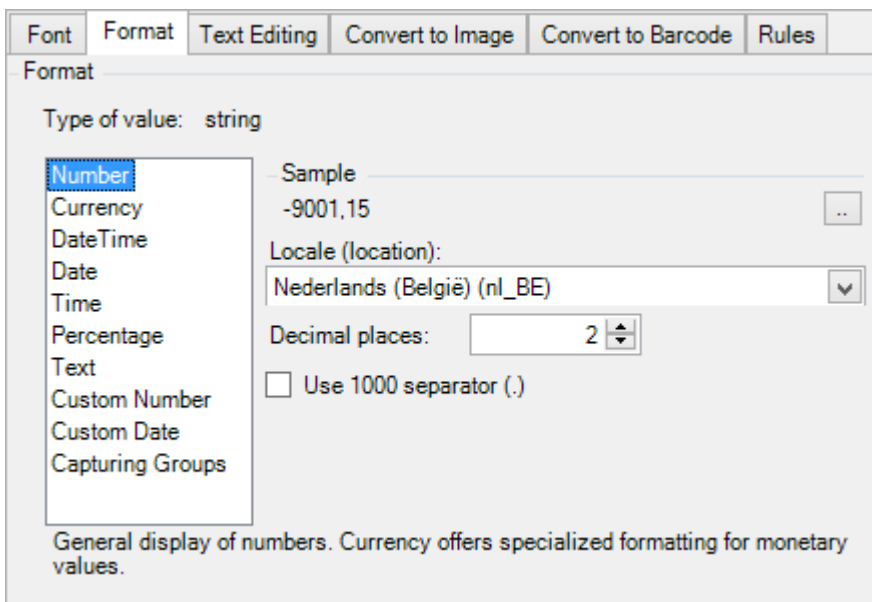
You can find more information about this tab in the [Electronic signatures chapter](#).

## 11 Numbers & dates

XperiDo offers you the possibility of using formatted numbers and dates. This article explains what you need to know to use them effectively.

### 11.1 Set the formatting

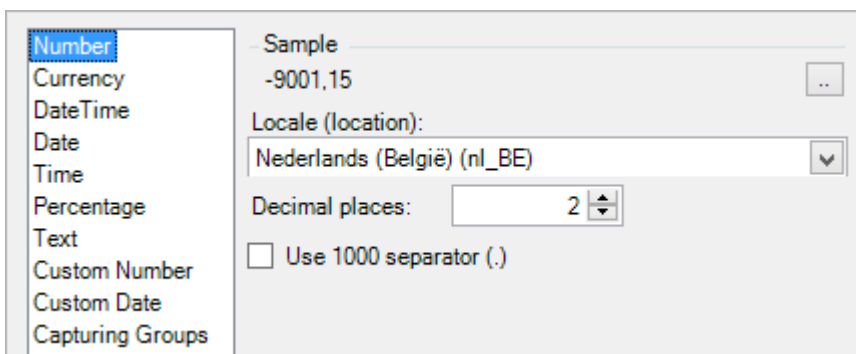
The most important part of working with numbers & dates is formatting them as such. You can do this in the [Format](#) tab of the [XperiDo Mapping](#) window.



You can access this window by double-clicking a mapping in the [Mapping](#) tab of the XperiDo pane.

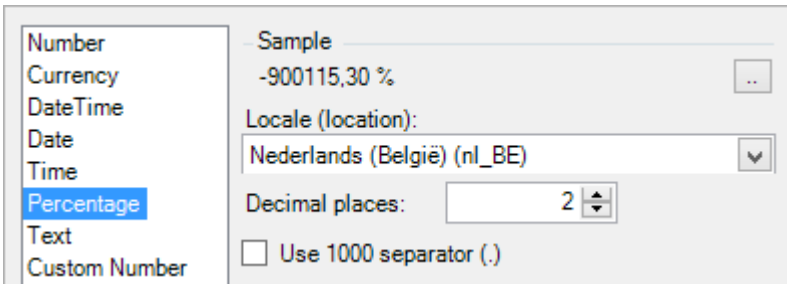
#### 11.1.1 Format as number

In the [Format](#) tab, you can select [Number](#):

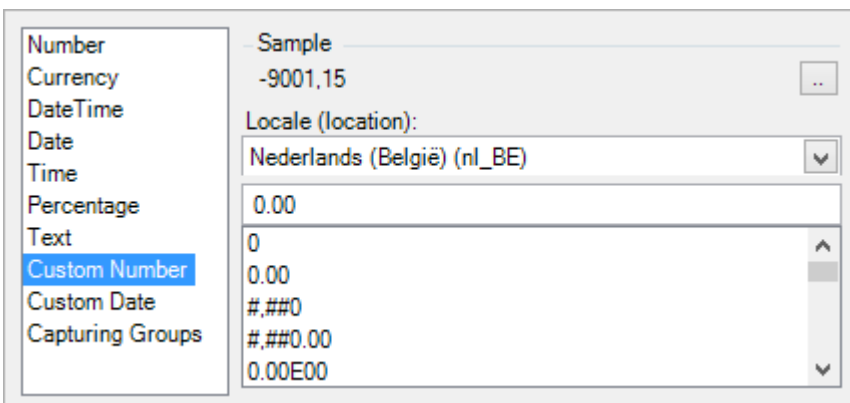




Here, you can set the number of decimal places and whether to use a 1000 separator. You can also set the [Format Locale](#), which is explained below. Select [Percentage](#) instead of [Number](#) to format your field as a percentage:

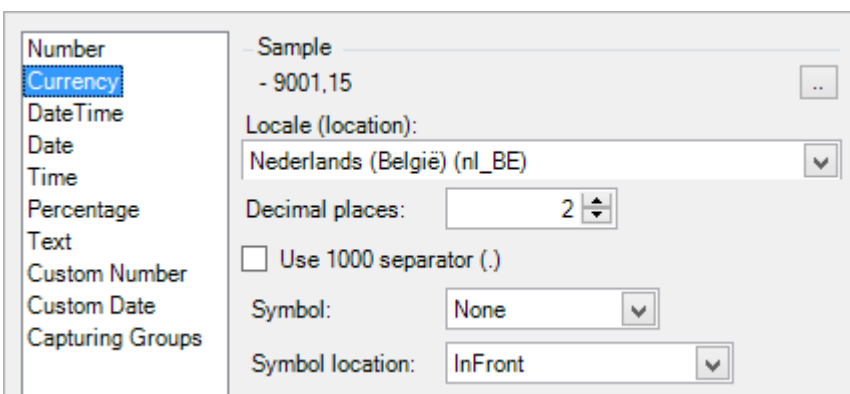


You can also select [Custom Number](#), which allows you to customize the number formatting:



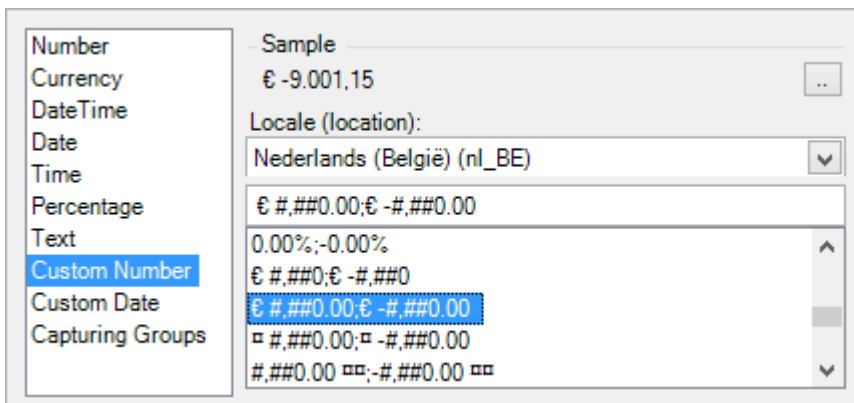
### 11.1.2 Format as currency

In the [Format](#) tab, you can select [Currency](#):



Here, you can set the number of decimal places and whether to use a 1000 separator. You can choose the symbol to use, and whether to show it before or after the number. You can also set the [Format Locale](#), which is explained below.

You can also select [Custom Number](#), which contains options for formatting as a custom currency as well:



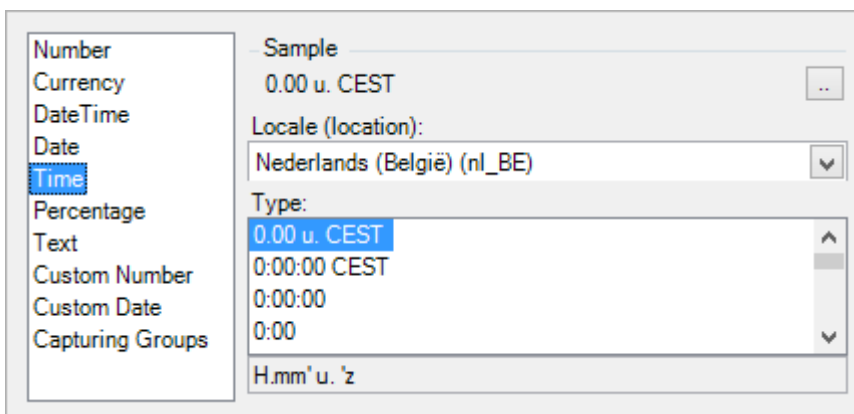
### 11.1.3 Format as date/time

In the [Format](#) tab, you can select [Date](#):

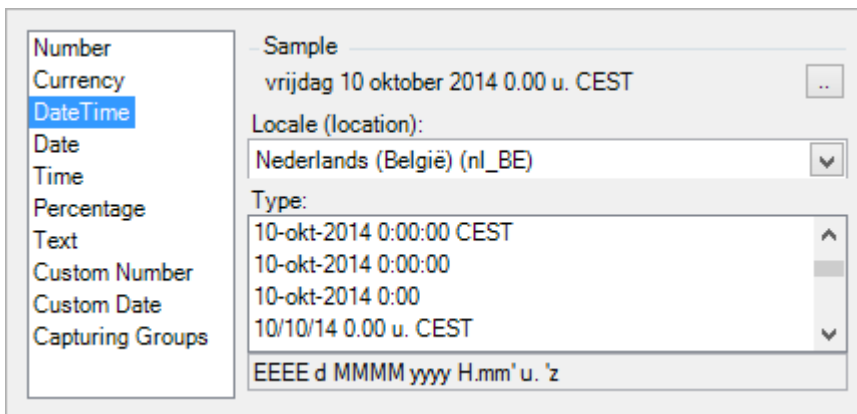


Here, you can choose how you want your date to be formatted. You can also set the [Format Locale](#), which is explained below.

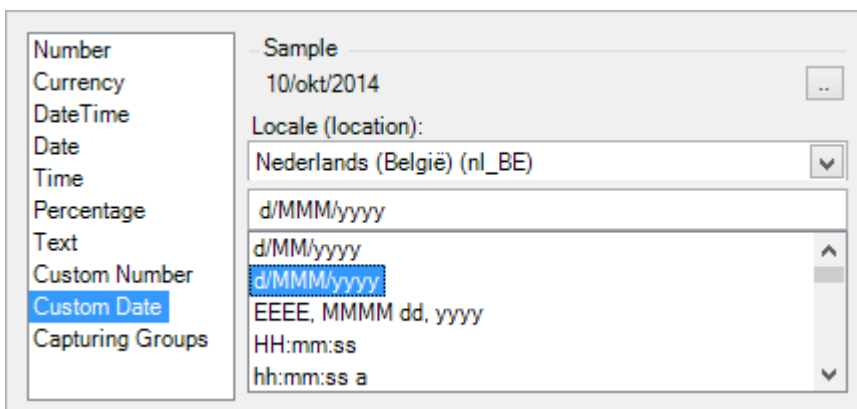
You can also select [Time](#), which you can use for formatting times:



Select [DateTime](#) if you want to include the time as well as the date:



Finally, you can select **Custom Date**, which allows you to customize the formatting:



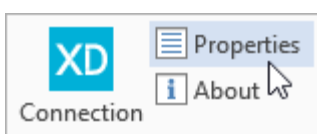
## 11.2 Locale

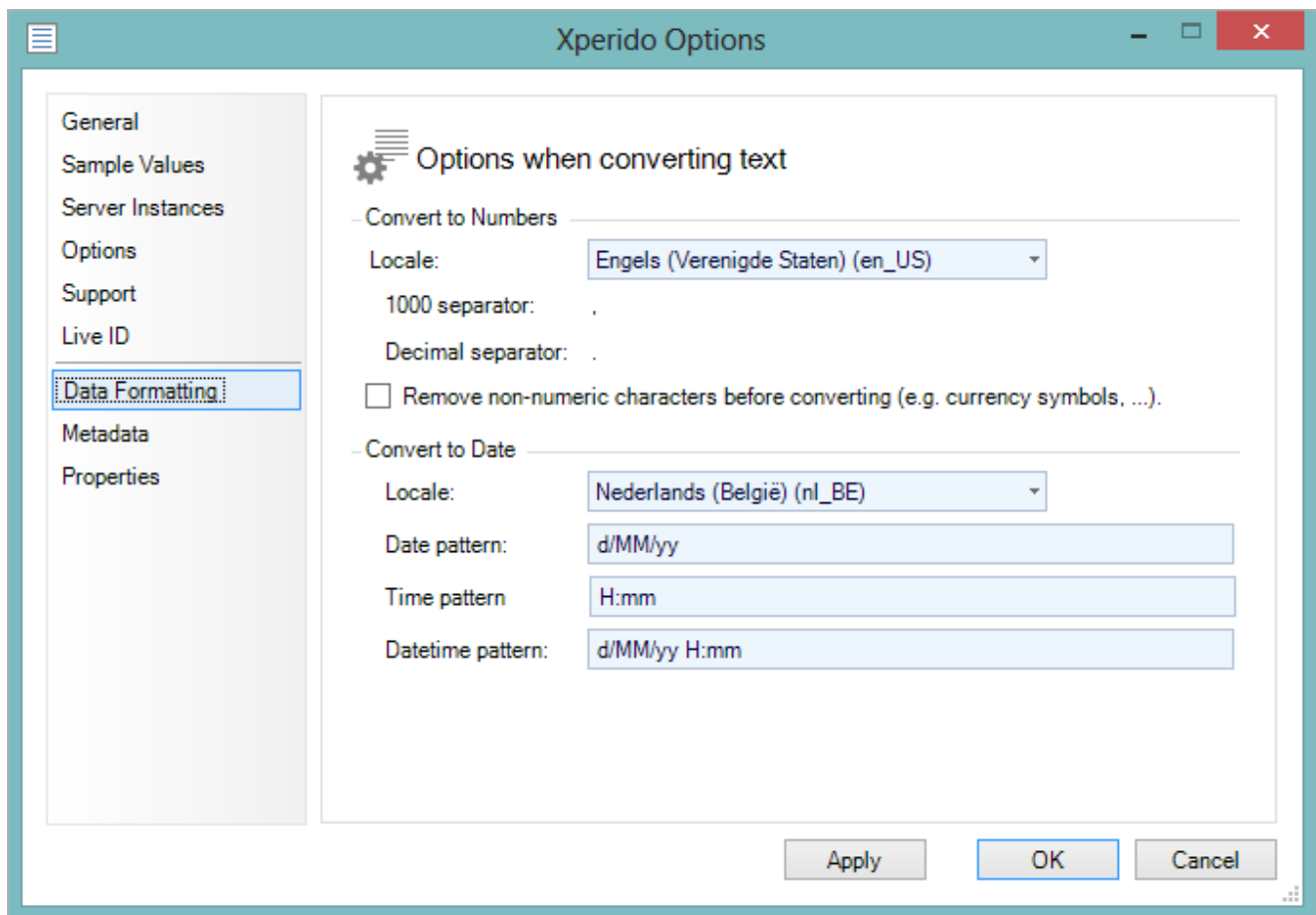
A locale is a **set of parameters** that defines the user's language, country and any special variant preferences. XperiDo uses these parameters to interpret or output data in a certain way.

### 11.2.1 Document locale

The **document locale** determines how input data is converted to usable numbers/dates/times. Setting your document locale correctly is very important, as this effectively tells the add-in how it should treat (for instance) a comma or a dot. Some languages use a comma as a 1000 separator and a dot as a decimal separator, while other languages do it the other way around.

Setting the document locale can be done in the XperiDo options, **data formatting** tab. You can access the options by clicking **Properties** in the XperiDo ribbon:





### 11.2.2 Format locale

The format locale determines the formatting of your output. For instance, when you choose to format your field as a **Number**, the locale then decides which symbols will be used for the 1000 separator and decimal separator.

### 11.2.3 Difference between document locale and format locale

Simply put, **the document locale determines how your input data is interpreted**, while **the format locale determines the formatting of your output**. In other words, input data is converted to a usable number/date, after which you decide how it looks in the final document.

## 11.3 Examples

We'll use the following example to explain the difference between the document locale and formate locale:

- This is our input data: **10,000.25**
- In the mapping settings' Format tab, we choose to use a **1000 separator** and **2 decimal places**

Then, we use the following document locale and formate locale:

- Document locale: `el_GR` (Greek, Greece)
  - 1000 separator: . (dot)
  - Decimal separator: , (comma)
- Format locale: `en_GB` (English, United Kingdom)
  - 1000 separator: , (comma)
  - Decimal separator: . (dot)

The document locale is wrongly set to Greek - it's wrong because the input data uses a comma for the **1000 separator** and a dot for the **decimal separator**, whereas the Greek locale is the other way around. Now that the input data is processed incorrectly, the format locale doesn't matter - it won't ever be shown correctly.

To show you how important the correct locale is, here is the result of processing the input data as Greek and outputting it as English: `100,002,500.00`. This is completely wrong!

Here's an example, using the same input data but a different document locale:

- Document locale: `en_GB` (English, United Kingdom)
  - 1000 separator: , (comma)
  - Decimal separator: . (dot)
- Format locale: `en_GB` (English, United Kingdom)
  - 1000 separator: , (comma)
  - Decimal separator: . (dot)

This document locale is correct, as our input data uses the same 1000 and decimal separator as the document locale. Here's the result of this locale setup: `10,000.25`. That's how we wanted it!

Now that the document locale is correct, we can use a different format locale to format the output according to the user's preference. For instance, we're setting up a template for use in Dutch-speaking Belgium, so we use the following locale:

- Format locale: `nl_BE` (Dutch, Belgium)
  - 1000 separator: . (dot)
  - Decimal separator: , (comma)

Here's the result of the output: `10.000,25`. Notice how this differs from the input data (`10,000.25`) only in the 1000 and decimal separators.

## 11.4 What you can do

Now that you know how the document locale and format locale work, you should try and match the document locale to the input data. This ensures that XperiDo uses the correct values. Once you have that set up properly,

you can decide how you want to output your numbers/dates. Using a different format locale is most useful when working with multiple countries that use different 1000 and/or decimal separators.

## 12 Images & barcodes

While you can use Word's image functionality for inserting static images, XperiDo allows you to insert variable images, convert fields to images, retrieve images from URL etc. How to do that is explained in this chapter.

### 12.1 Concept

To insert an image/barcode, you have to [convert an XperiDo mapping's value to an image/barcode](#). There are different ways to convert an XperiDo mapping's value to an image:

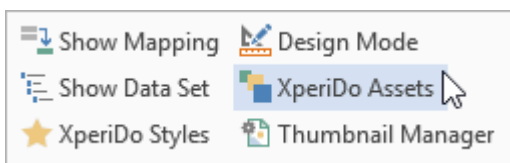
- [Asset](#): here you use a value from the XperiDo Assets folder (more information about XperiDo Assets below).
- [Asset lookup](#): here you link each value to a different image from the XperiDo Assets. Depending on the value, a different image is shown.
- [URL](#): here you get the image from the internet.
- [Fileshare](#): here you retrieve the image from the XperiDo server.
- [Binary encoded](#): here the image is stored as a base64 string.
- [Insert document as image](#): here a separate document is inserted as an image.

For barcodes, you need to supply the barcode code in a field in your data.

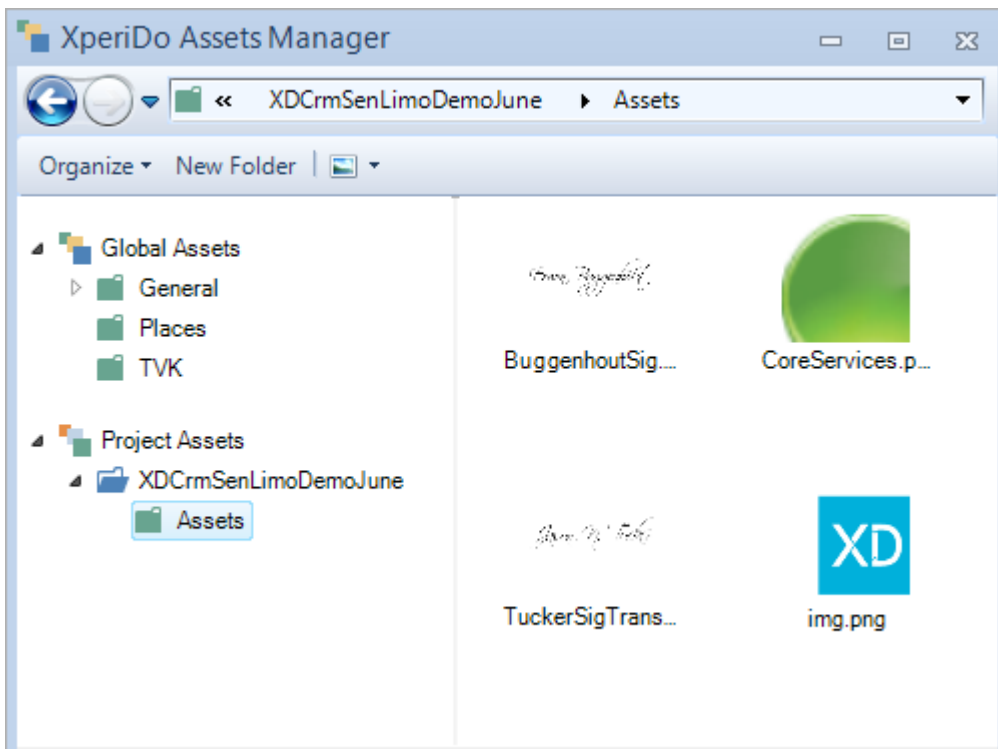
### 12.2 XperiDo Assets

[XperiDo Assets](#) are images that you can add to your project. These images can then be used in all of your templates.

To access your assets, click [XperiDo Assets](#) in the XperiDo ribbon:



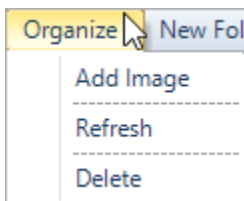
This brings up the [XperiDo Assets manager](#):



The XperiDo Assets manager can be used to manage your assets.

### 12.2.1 Controls

Click [Organize](#) to bring up a submenu:



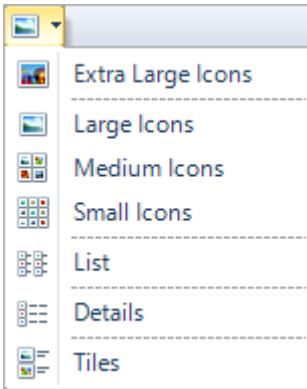
- **Add Image:** add an image. Select the folder you wish to add it to and click [Add image](#). Select an image from the pop-up window and click [Open](#).
- **Refresh:** refresh the assets.
- **Delete:** remove an image. Select the image you wish to remove and click [Delete](#). Click [Yes](#) to confirm.

To create a new folder, first select the parent folder, then click [New Folder](#) to create it.



Click the [image button](#) to choose your desired view:

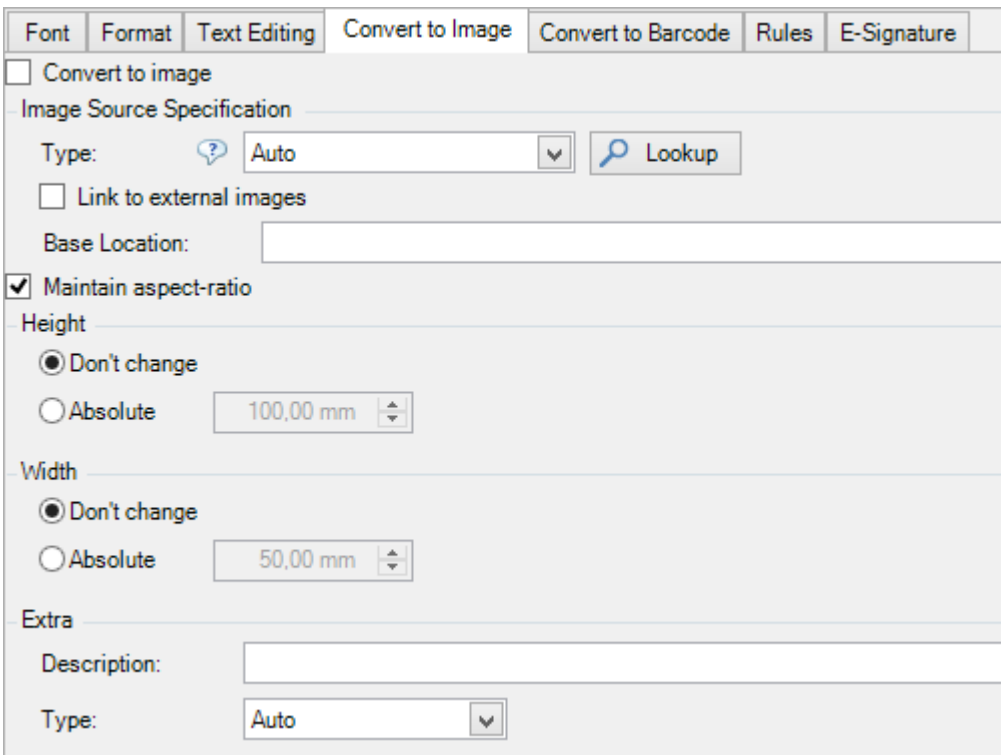




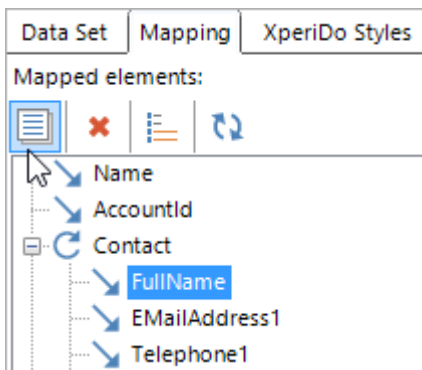
To rename an image, select it and click **F2** or [click it again](#).

### 12.3 Converting mappings to images

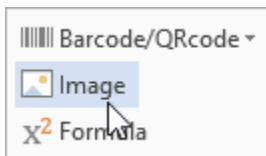
Converting XperiDo mappings' values to images is done through the [Convert to image](#) tab in the XperiDo mapping window:



You can bring up this window by double-clicking a mapping in the [mapping](#) tab of the XperiDo pane, or by selecting a mapping and clicking the [Settings](#) button:

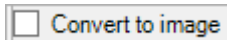


You can also click [Image](#) in the XperiDo ribbon to create an empty mapping with the [Convert to image](#) option enabled:



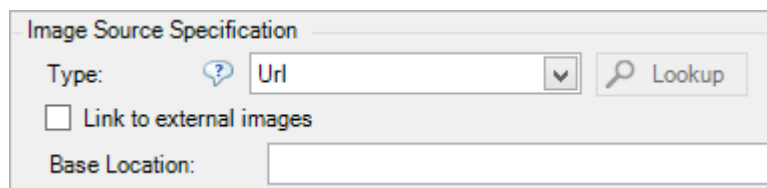
### 12.3.1 General controls

The [Convert to image](#) tab contains a check box that you need to check if you want the mapping to be converted into an image:



The tab offers a few further options:

- [Image source specification](#): here you choose how to convert the mapping's value into an image.



- [Type](#): the method used to convert the mapping value. All of the presented options are further explained below.
- [Link to external images](#): see [Url](#) (below).
- [Base Location](#): the prefix that will be added to the mapping's value. This is useful e.g. when your mappings contain the names of the images, but not the location. Instead of adding the location in an expression, followed by the mapping's value, you can specify it in the [Base Location](#). (an example of this can be found in [Url](#) below)
- [Height/Width](#): here you specify the height and width of the image. [Don't change](#) means that you leave the image as is.
- [Extra](#): here you can change the hover-over text in [Description](#). [Type](#) should best be set to the format of the image.

### 12.3.2 Auto

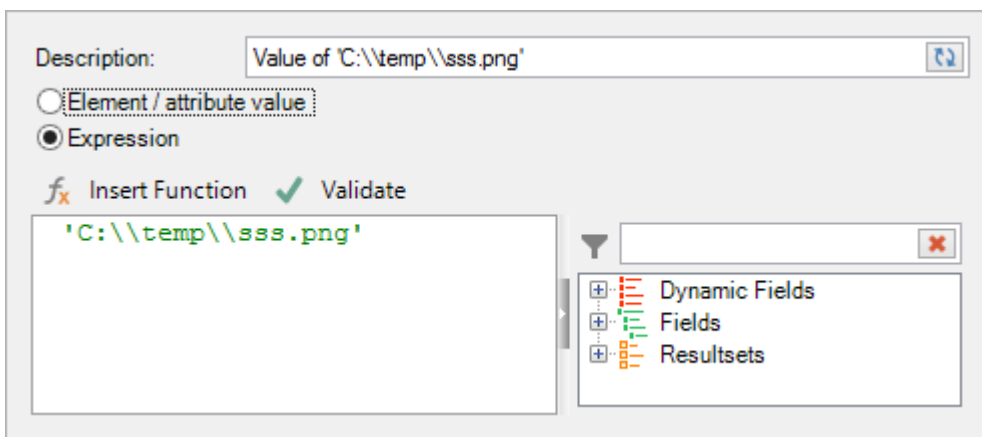
This option will force XperiDo to guess the correct image source specification.

It is not recommended to use this option unless you cannot be sure how the data is formatted.

### 12.3.3 Fileshare

This option allows you to retrieve an image from the XperiDo server.

The most important thing here is that you define your image location correctly. Your mapping should contain the location **with double backslashes**, such as `C:\\temp\\sss.png`. If you do not have the location in your data set, then you can use an expression to get the image. In the expression window, you need to enter the location **in between apostrophes**:



Note that these apostrophes are not needed when the value comes straight from a mapping.

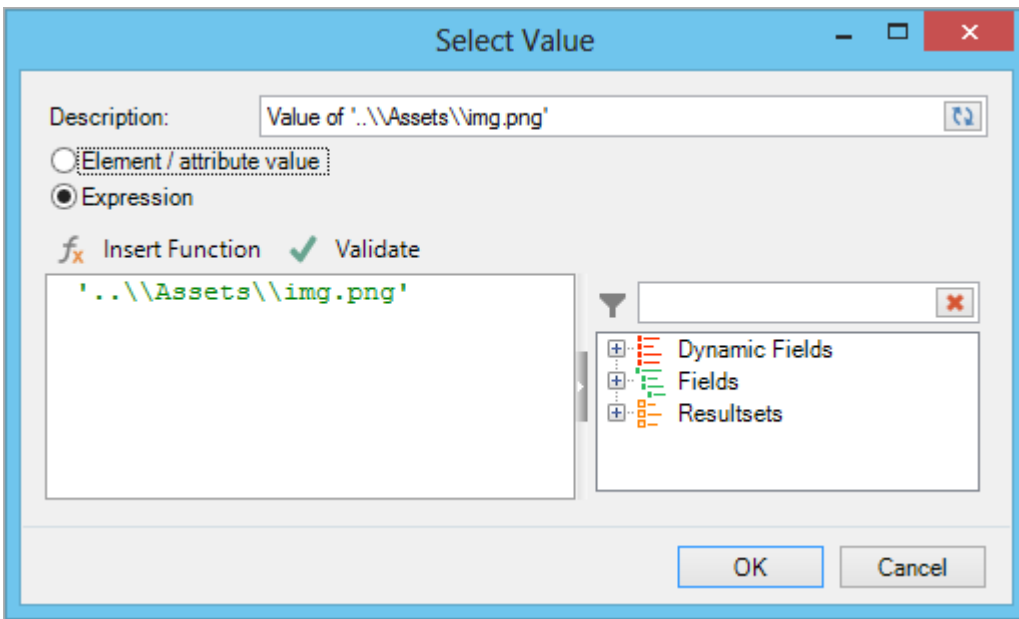
### 12.3.4 Asset

This option allows you to use one of the images in the XperiDo Assets in your template

As with **Fileshare**, it's important to define the image location correctly. Specifying this location is done in the same way as you would with Fileshare (see above), except that you're looking for a file relative to your template.

By default, the XperiDo Assets are stored in a folder called **Assets**. This folder is on the same level as the **Templates** folder, which contains your templates. This means that you need to specify the location of your image like this: `..\Assets\\img.png`. The `..\` means that you're going up a level.

You can specify this in the expression window:

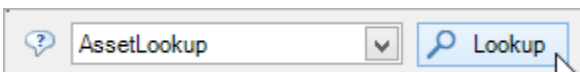


You can also store this location in your data set.

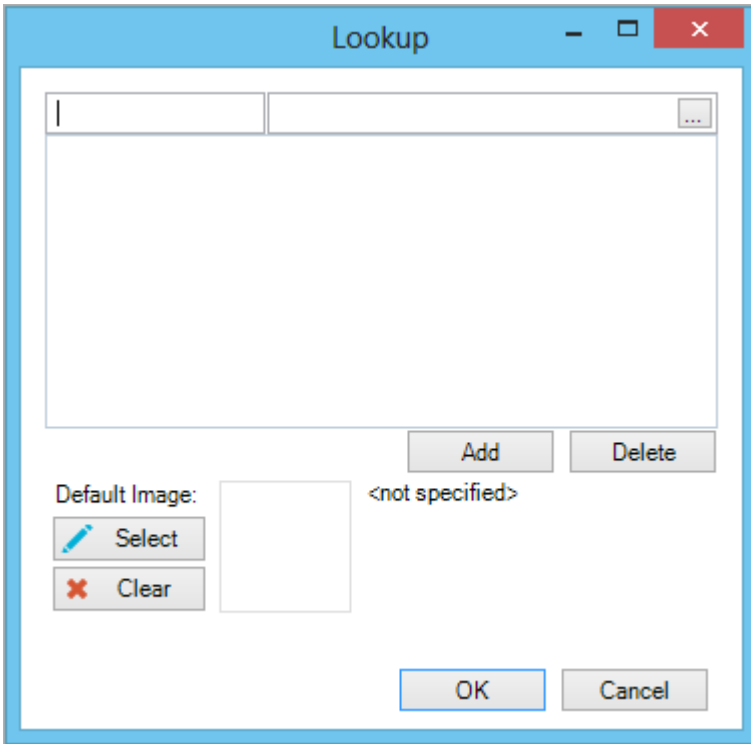
### 12.3.5 AssetLookup

This option allows you to assign assets to certain values of your mapping. You can decide which values are linked to which image by specifying value-image pairs in a [lookup table](#).

When you choose this option, an extra button is unlocked:



Click the [Lookup](#) button to bring up a window:

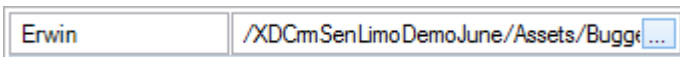


### 12.3.5.1 Building your lookup table

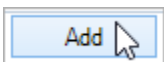
The top is where you define which value is linked to which image. Type your value in the left text box:



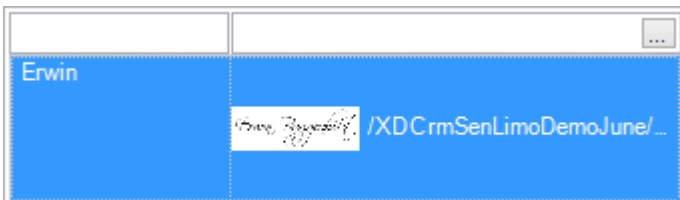
Then, click the ... to choose an image from the [XperiDo Assets](#). Select the image you want and click **OK**:



Now you have created a value-image pair. To finalize this, click **Add** to add this to the lookup table.

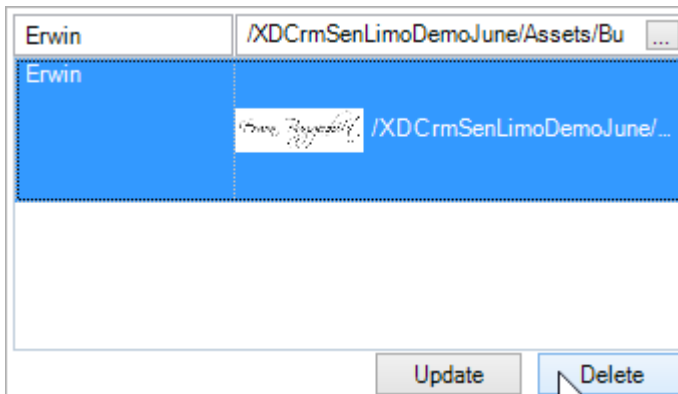


The value-image pair is now added to the lookup table.



You can add more pairs in the same way - there is no limit to the amount of pairs you can add.

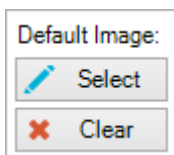
If you want to remove a value-image pair, select it in the lookup table and click **Delete**.



### 12.3.5.2 Default image

You can add a default image to your lookup table. This image will be used when the mapping's value does not correspond to any value in the lookup table.

To add a default image, click [Select](#):



If you no longer want to use the default image, click [Clear](#).

### 12.3.6 BinaryEncoded

This option allows you to render a [base64 encoded](#) value as an image. You can use when your data set includes images that are stored as a base64 string.

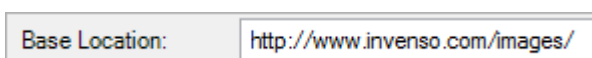
For more information about Base64, please visit <http://en.wikipedia.org/wiki/Base64>.

### 12.3.7 Url

This option allows you to retrieve an image from a URL.

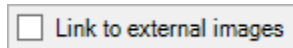
If you plan on using this option, you should be aware of the fact that every time a document is generated, the image has to be downloaded. This can impact performance. If you experience severe slowdown issues, we suggest you use the XperiDo Assets feature.

When using URL, the [Base Location](#) can prove useful. For instance, let's say your data set contains the following values: [intro.png](#) and [menu\\_button.png](#). These are two references to images, but they are not URLs. To fix this, you can add their location to the Base Location, like this: <http://www.invenso.com/images/>.



Now they refer to <http://www.invenso.com/images/intro.png> and [http://www.invenso.com/images/menu\\_button.png](http://www.invenso.com/images/menu_button.png).

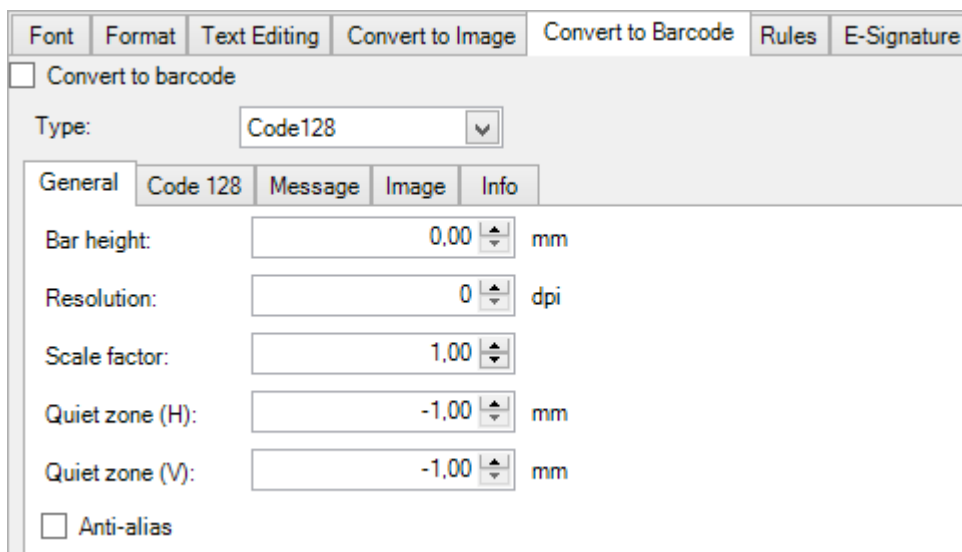
Finally, there's a checkbox [Link to external images](#).



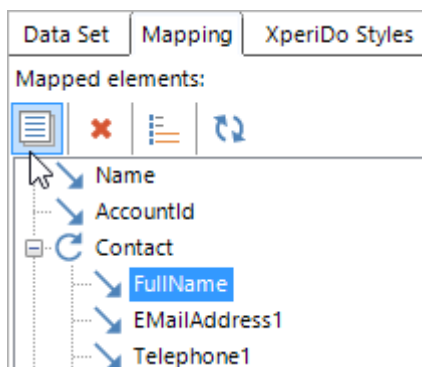
Checking this will insert a link to the image instead of the image itself. When the document is opened, the image will then be downloaded. This has the advantage that XperiDo does not time out on images that it cannot access, but the downside is that the image must be downloaded every time the document is opened.

## 12.4 Converting mappings to barcodes

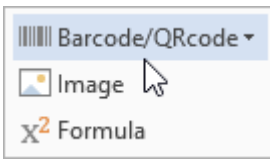
Converting XperiDo mappings' values to images is done through the [Convert to barcode](#) tab in the XperiDo mapping window:



You can bring up this window by double-clicking a mapping in the [mapping](#) tab of the XperiDo pane, or by selecting a mapping and clicking the [Settings](#) button:

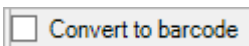


You can also click [Barcode/QRcode](#) in the XperiDo ribbon to create an empty mapping with the [Convert to barcode](#) option enabled:

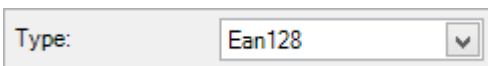


### 12.4.1 Controls

The [Convert to barcode](#) tab contains a check box that you need to check if you want the mapping to be converted into an image:



You can choose the desired barcode type in the dropdown list:



These are the types you can choose from:

- Codabar
- Code128
- Code39
- DataMatrix
- Ean128
- Ean13
- Ean8
- Interleaved2of5
- ITF14
- PDF417
- Postnet
- QRCode
- RoyalMailCBC
- UPCA
- UPCE
- USPSIntelligentMail

While every barcode type has its own settings, the [General](#) tab is the same for all barcodes:



Bar height:	<input type="text" value="0,00"/>	mm
Resolution:	<input type="text" value="0"/>	dpi
Scale factor:	<input type="text" value="1,00"/>	
Quiet zone (H):	<input type="text" value="-1,00"/>	mm
Quiet zone (V):	<input type="text" value="-1,00"/>	mm
<input type="checkbox"/> Anti-alias		

- **Bar height:** the height of the barcode's bar (in mm).
- **Resolution:** the barcode's print resolution (in dots per inch). A higher resolution results in a more detailed print.
- **Scale factor:** how much the barcode should be scaled. A factor of 2 scales the barcode by 200%.
- **Quiet zone horizontal:** how much white space is added to the left and right of the barcode.
- **Quiet zone vertical:** how much white space is added to the top and bottom of the barcode.
- **Anti-alias:** whether you want the barcode to be anti-aliased.

The **Image** tab is also the same for all barcodes:

<input checked="" type="checkbox"/> <b>Maintain aspect-ratio</b>	
- Height	
<input checked="" type="radio"/> Don't change	
<input type="radio"/> Absolute	<input type="text" value="100,00 mm"/>
- Width	
<input checked="" type="radio"/> Don't change	
<input type="radio"/> Absolute	<input type="text" value="50,00 mm"/>
- Description	
<input type="text"/>	

- **Maintain aspect-ratio:** whether to keep the aspect ratio (width/height) intact when scaling the image. For most barcodes, you will likely want to turn this setting on.
- **Height:** the height of the barcode (in mm).
- **Width:** the width of the barcode (in mm).
- **Description:** the textual description of the barcode.

The **Info** tab shows you an example of the barcode you selected. The other tabs are barcode-specific.

## 13 Styling

Templates not only need to be functional - you'll want them to look a certain way as well. You might have a house style, design guidelines, corporate typefaces and colors that you want to incorporate in your template. This chapter explains how to style your template with Word or XperiDo.

### 13.1 Concept

After a mapping has been formatted, it can be **styled** to make it look the way you want it to. Styling includes (but is not limited to) the font, color, borders, text size - anything that alters the appearance of the mapping without changing the content is styling.

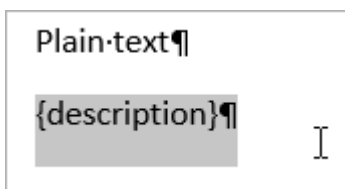
For more information about formatting, check out [this chapter](#).

Styling can be done either via Word's regular styling, or you can use XperiDo's own styling options.

### 13.2 Styling with Word

When styling your template, Word doesn't differentiate between plain text and XperiDo mappings. This means that you can use every styling tool there is available in Word on XperiDo mappings.

To style your mapping, simply select it like you would select plain text:



Then, apply the styling of your choice.



This also applies to tables, where you can use [Word's table design tools](#) to style your tables, even if they include loops and groups:

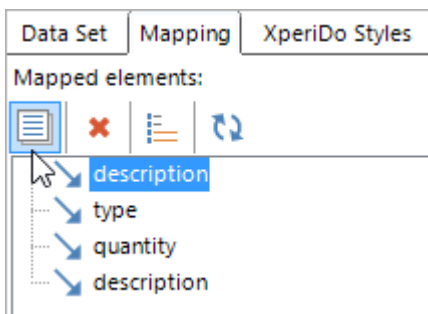
Description	Type	Quantity
{description}	{type}	{quantity}

The applied style is a banded style where every other row gets a different background color. XperiDo keeps that styling intact:

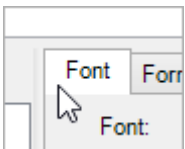
Description	Type	Quantity
Black Marker 3.5	marker	265
Red Marker 2.5	marker	30
Green Marker 2.5	marker	6
Paper Clip box 250	paper clip box	36
Paper Clip box 500	paper clip box	18
Stapler 80K	stapler	18
Stapler 110K	stapler	20

### 13.3 Styling with XperiDo's font tab

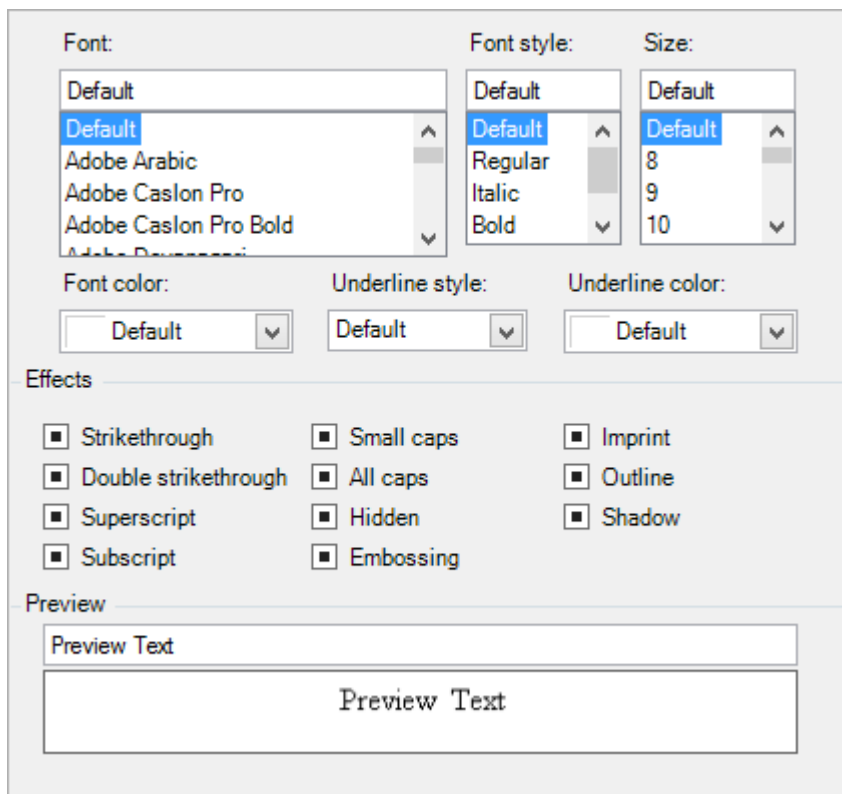
XperiDo comes with styling options as well. You can access these by double-clicking a mapping in the [Mapping](#) tab of the XperiDo pane (or clicking the mapping and then clicking the [Settings](#) button in the pane):



In the window that appears, click the [Font](#) tab:



You are now presented with the following options:



In here, you can change a mapping's styling by changing each setting to your liking.

### 13.3.1 Inheritance

If you leave a setting on **Default**, the value for that setting is inherited from Word. This means that every value you set explicitly here overwrites Word's setting.

For the effects, you can either turn them off, on or set them to default:

- **Outline**: off
- **Outline**: on
- **Outline**: default

### 13.3.2 How to use effectively

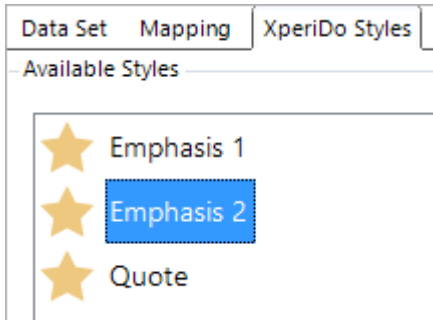
XperiDo's font tab is not intended to replace Word's styling options. In fact, we recommend that you use Word's styling options as much as possible for your styling needs. XperiDo's font tab comes in handy when working with [conditional styling & formatting](#), where you e.g. display negative monetary values in red.

You can read more on conditional styling & formatting in [this chapter](#).

## 13.4 XperiDo styles

XperiDo styles allow you to globally define a style which you can then re-use in multiple mappings. Using XperiDo styles is pretty similar to using Word styles, except that you have additional options available to use in XperiDo styles.

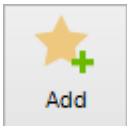
You can find XperiDo styles in the [XperiDo styles](#) tab of the XperiDo pane:



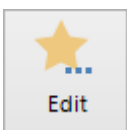
We encourage you to use XperiDo styles for oft-used styling/formatting settings, as you only need to set them once instead of having to set each mapping's styling/formatting every time.

### 13.4.1 Setup

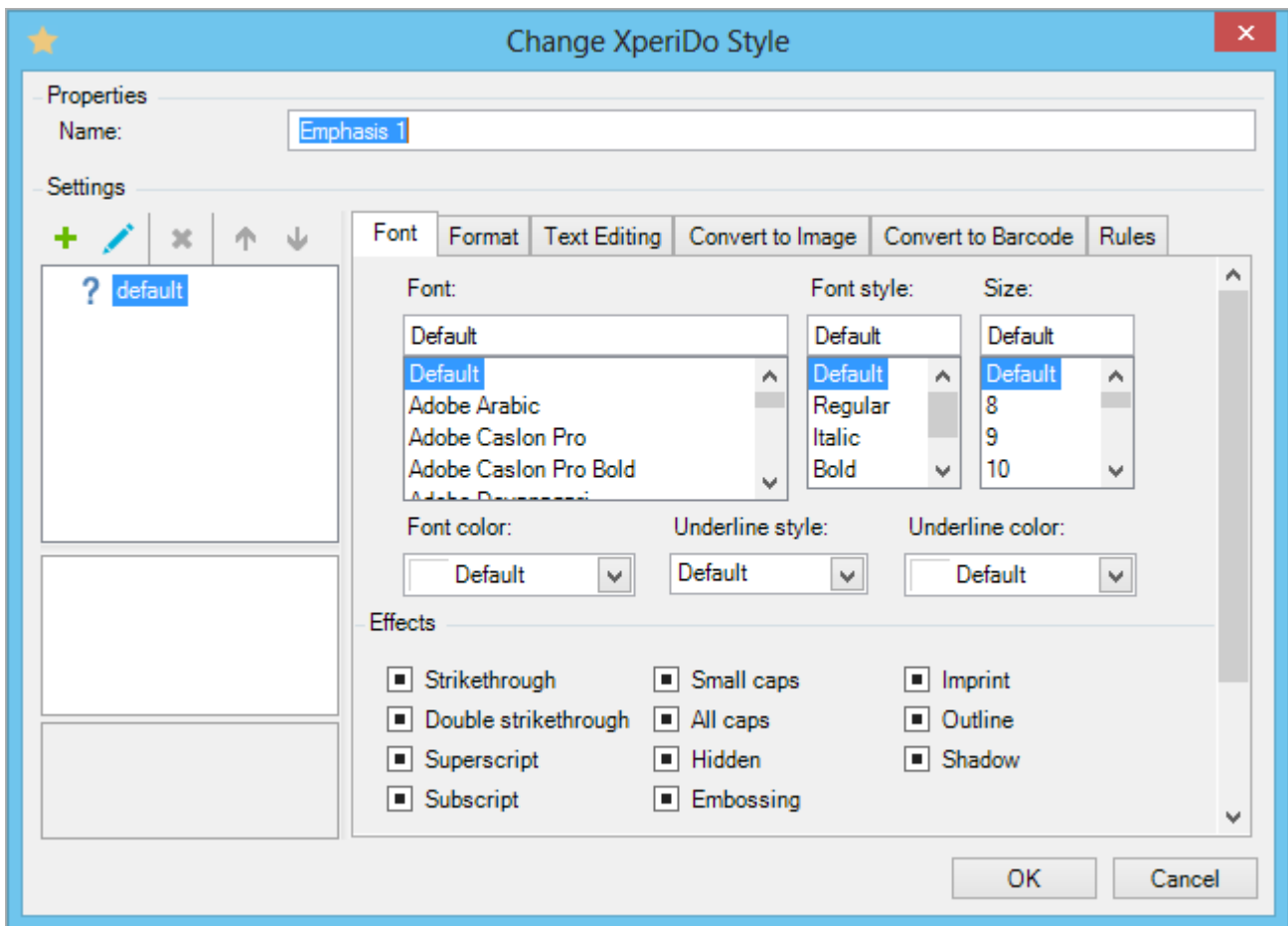
To create a new XperiDo style, click the [Add](#) button in the [XperiDo styles](#) tab:



Give your style a name, then double-click it to change its settings. You can also select it and click [Edit](#):



In the window that pops up, you can change the XperiDo style's styling and formatting settings:



In this window, you can change the style's styling and formatting by clicking one of the [tabs](#) and changing the settings. For more information on how these settings work, check out the [Styling](#) and [Formatting](#) chapters.

The [left side](#) of this window allows you to set up conditional formatting. [This chapter](#) explains how to set up conditional formatting.

Once you are happy with your XperiDo style's setup, click [OK](#) to close the window.

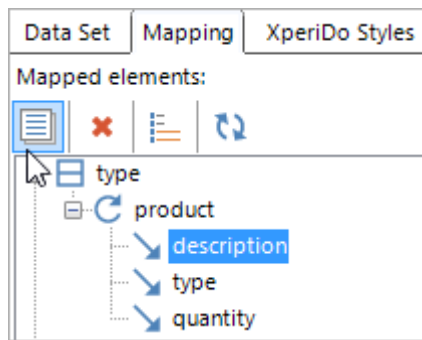
### 13.4.2 Application

There are two ways of applying your XperiDo style to a mapping: [direct](#) or with a [default field style](#).

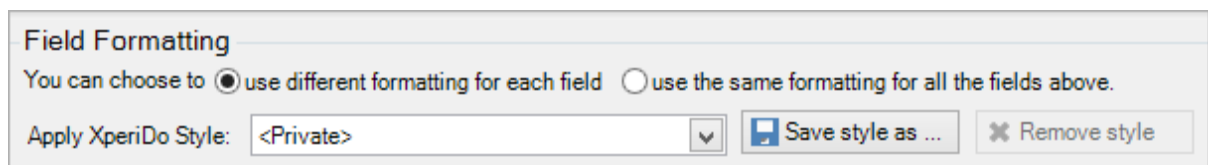
#### 13.4.2.1 Direct

[Direct application](#) means that you go into the settings of a mapping and apply your XperiDo style there. To do that, follow these steps:

- 1) Open the mapping's [settings](#).



- 2) In the window that pops up, you'll see the following XperiDo style-related options:



- 3) From the [drop-down list](#) here, choose the style that you want to apply to this mapping.
- 4) Click [OK](#) to close the window.

That mapping now uses the styling/formatting as set in that XperiDo style.

There are a few more options you can set here:

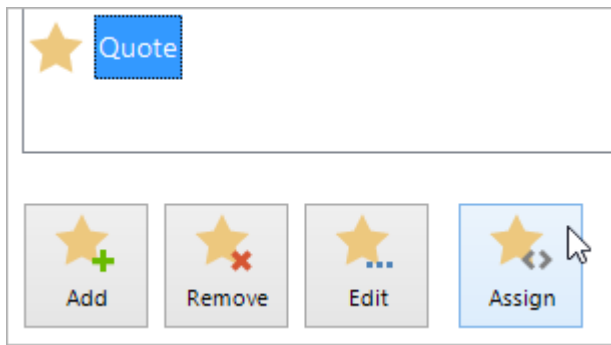
- If you no longer want to use an XperiDo style for that mapping, select [<Private>](#) in the drop-down list.
- If you are editing a [<Private>](#) style, you can turn it into an XperiDo style by clicking [Save style as ...](#)
- If you no longer need a certain XperiDo style, you can select it in the list and click [Remove style](#). Remember, this removes it globally.
- If you have set up multiple value-condition pairs in the [Field Selection](#) window (more information about [conditional mappings](#) in [this chapter](#)), you can choose to [use a different style/formatting for each field](#), or [use the same style/formatting for all fields](#) by choosing the correct setting.

#### 13.4.2.2 Default field style

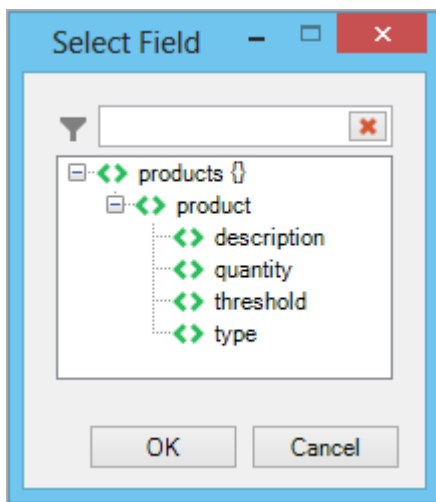
Using a [default field style](#) means that you assign an XperiDo style to a field, after which every new mapping of that field will use that XperiDo style. This is particularly useful for values that are always interpreted the same way, such as monetary values, dates or times.

To assign an XperiDo style to a field, follow these steps:

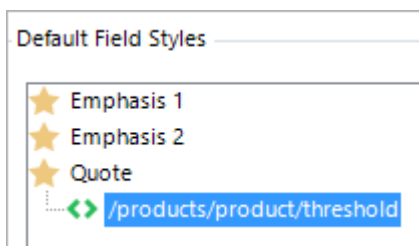
- 1) Select your XperiDo style and click [Assign](#).



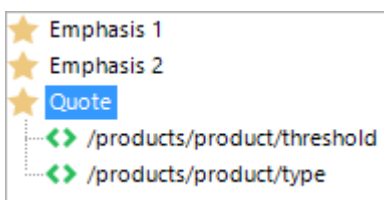
2) In the window that pops up, select the [field](#) you wish to assign this XperiDo style to.



3) You'll see the field being added to the list of [Default Field Styles](#):



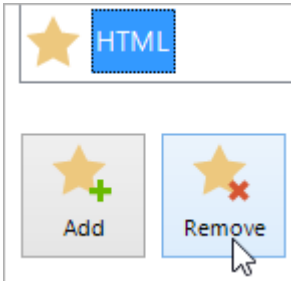
You can assign multiple fields to the same XperiDo style by repeating the above procedure:



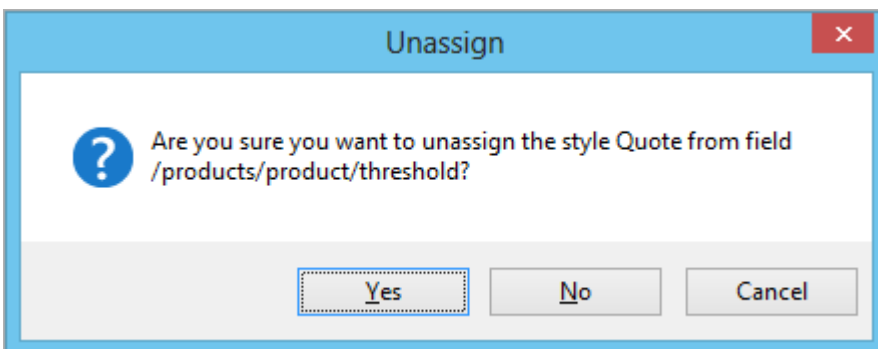
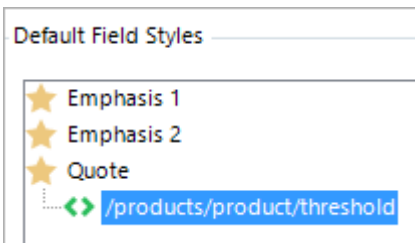


### 13.4.3 Removal

If you want to remove an XperiDo style from the list, select it and click [Remove](#):



You can remove a default field style by selecting the field and hitting [Delete](#):



## 14 Conditional content

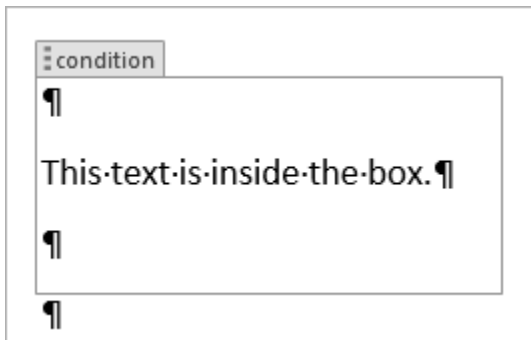
Templates are quite dynamic in that they are injected with different data every time you generate a document. But you can make them even more dynamic by making some parts conditional. These conditions can be based on any combination of multiple field values, giving you plenty of flexibility for setting up your templates.

### 14.1 Concept

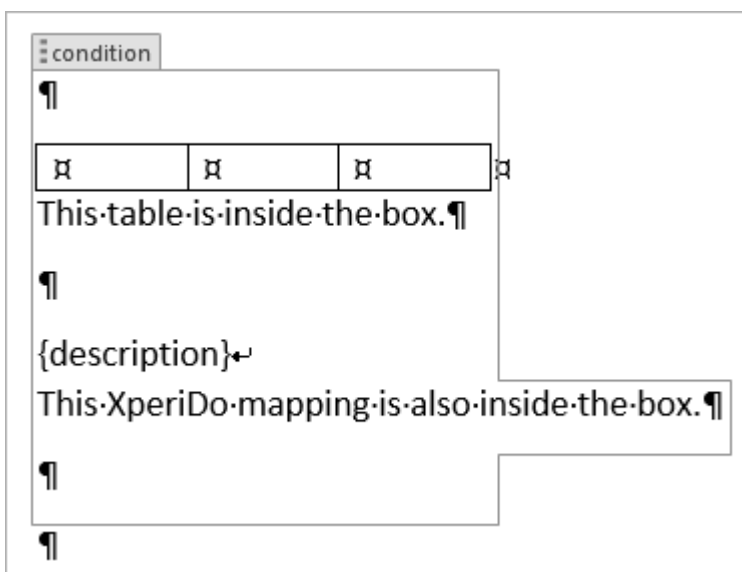
You can make your content conditional in 3 ways: either by using [conditional boxes](#), [conditional mappings](#) or [conditional styling & formatting](#).

#### 14.1.1 Condition box

A [condition box](#) is a user-designated zone whose content is only visible if the associated condition is true.



You can insert anything you like in the box, allowing you to display or hide entire pages, parts of paragraphs, some words, images, text boxes - anything you can insert in a Word document can be inserted into a condition box.



### 14.1.2 Conditional mapping

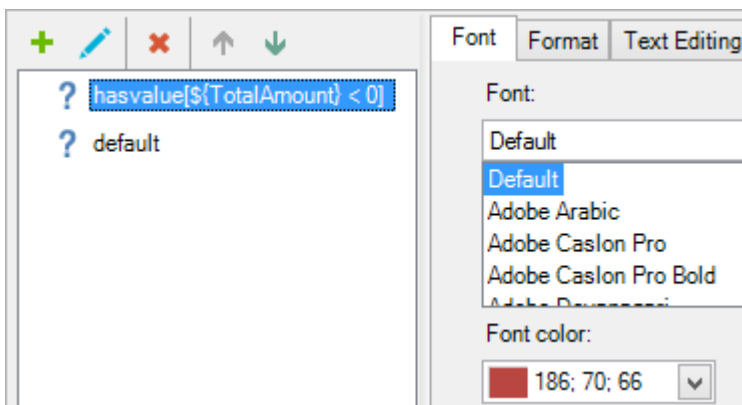
A **conditional mapping** is a mapping whose value depends on one or multiple conditions. You assign a value to each condition - the first condition that is true passes on its value.

Value	Condition
Value of 'Mr'	hasvalue[ $\{GenderCode\}$ equals Male]
Value of 'Ms'	hasvalue[ $\{GenderCode\}$ equals Female]
Value of 'Mr or Ms'	default

The above example turns the mapping's value into **Mr** if the original value is **Male**, and **Ms** if it's **Female**. If there is no original value, **Mr or Mrs** is displayed.

### 14.1.3 Conditional styling & formatting

A mapping with **conditional styling & formatting** is a mapping whose styling & formatting is different depending on some condition.

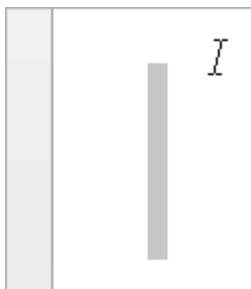


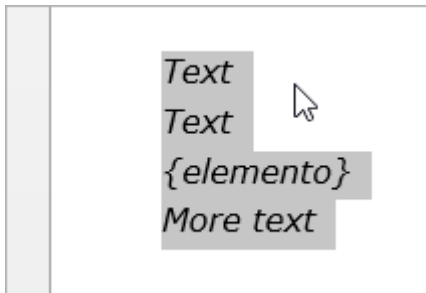
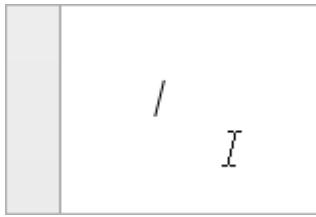
The above example displays the **TotalAmount** value in red only when that number is negative.

## 14.2 Condition box

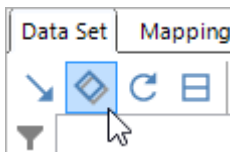
To insert a condition box, follow these steps:

- 1) Either place your cursor in the document, or highlight a zone.

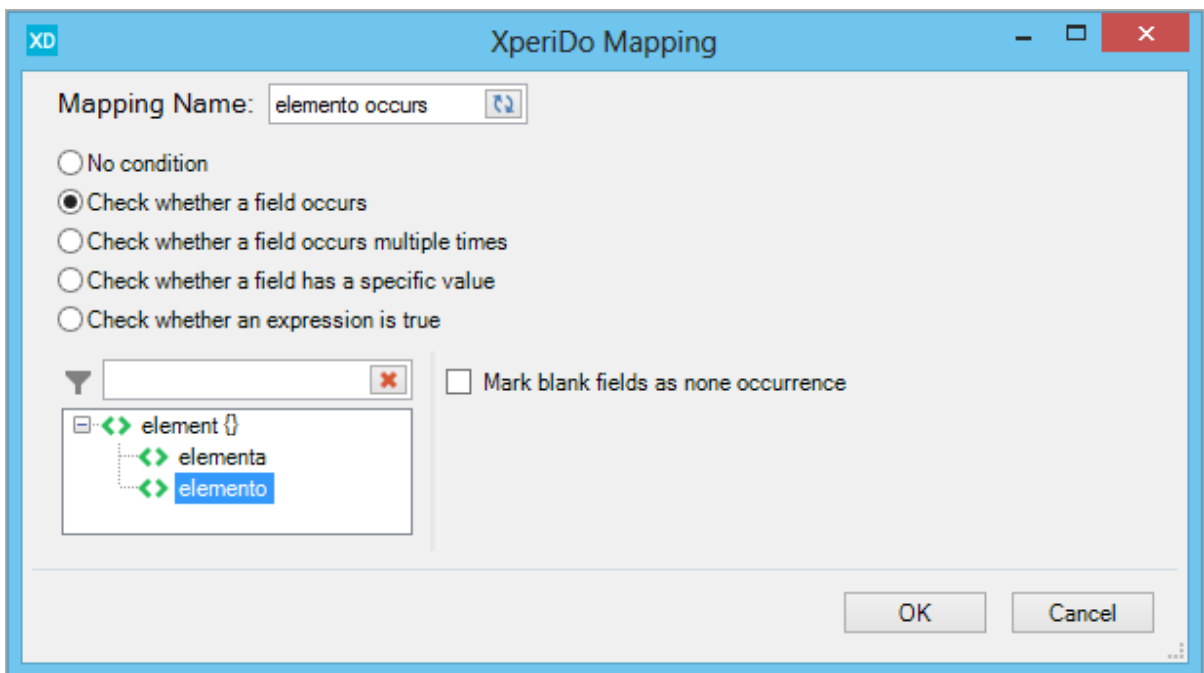




- 2) Click **Condition** in the XperiDo pane's **Data set** tab. This inserts a default condition that checks whether the selected field occurs.

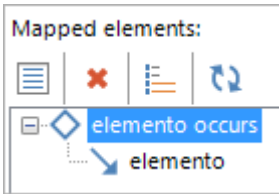


- 3) Define your condition in the window that opens. For more information on how to define your condition, click [here](#).



4) Once you have defined your condition, click **OK** to finalize it.

The **Mapping** tab of the XperiDo pane now shows the condition:



You'll also see the condition box in your template:



More information about how to work with boxes can be found in [this article](#).

## 14.3 Conditional mapping

### 14.3.1 Value-condition pairs

Making a mapping's content conditional is done by defining **value-condition pairs**. A value-condition pair is a combination of a **value** (this can be a mapping or any expression you like) and a **condition**. When the document is created, XperiDo cycles through all the value-condition pairs for that mapping. The first condition that is true passes on its associated value, which becomes the value for that mapping.

The following example shows this:

Value	Condition
Value of 'Mr'	hasvalue[{\$GenderCode} equals Male]
Value of 'Ms'	hasvalue[{\$GenderCode} equals Female]
Value of 'Mr or Ms'	default

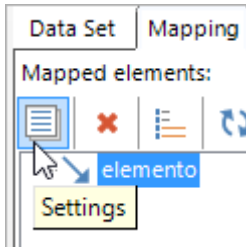
Here, 3 value-condition pairs are defined. The first (top) checks whether the **GenderCode** field's value is **Male**. If so, the value **Mr** is returned. If that condition check isn't true, the next (middle) condition is checked. Here the condition checks whether the **GenderCode** field's value is **Female**. If so, the value **Mrs** is returned.

Finally, the last (bottom) condition is the **default** condition. This is **always true** and acts as a fail-safe - if all the other conditions are false, then the value associated with the default condition is used.

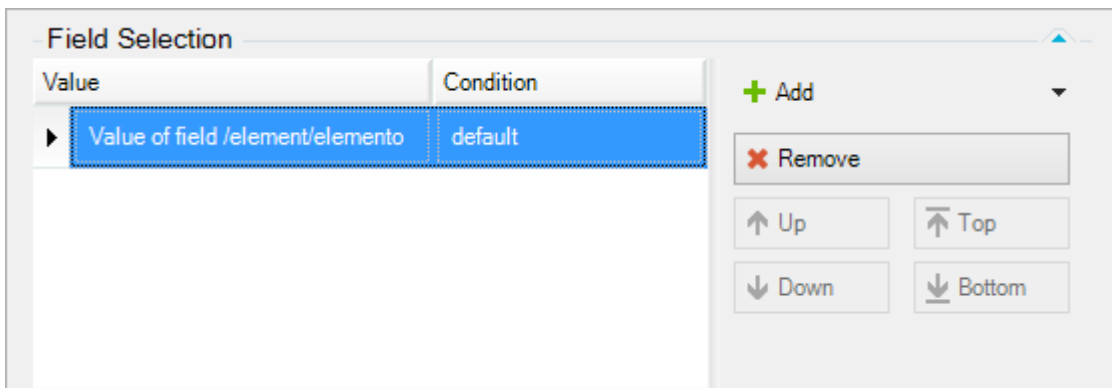
### 14.3.2 Setup

To set the value-condition pairs of your mapping, follow these steps:

- 1) In the XperiDo pane's **Mapping** tab, select the mapping and click **Settings**.

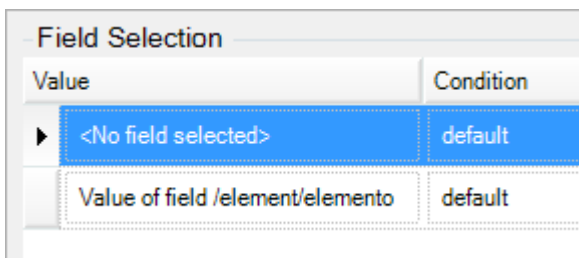
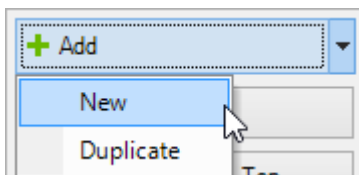


This brings up the **XperiDo Mapping settings** window. The **Field selection** part shows the current value-condition pairs.

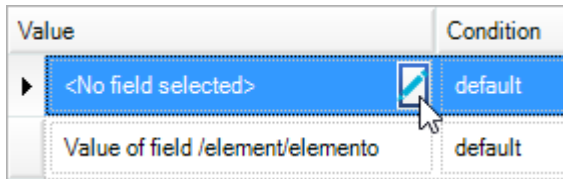


The default value-condition pair is the **default** condition (always true) paired with the field this mapping refers to.

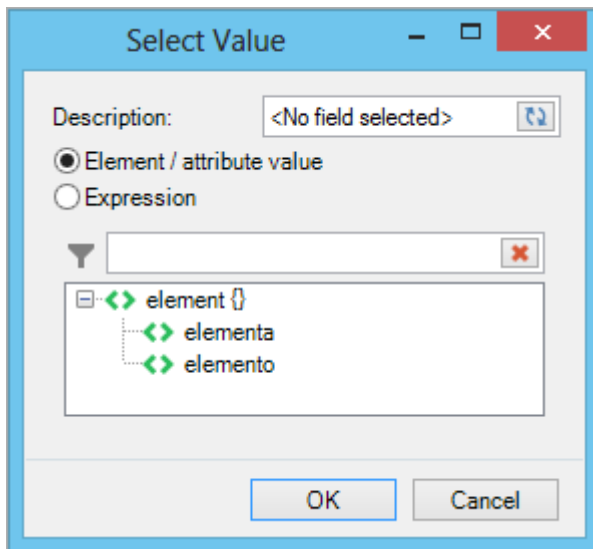
- 2) To add another value-condition pair, click **Add**, then select **New** (to create a new pair) or **Duplicate** (to duplicate the selected pair):



- Now you need to change the value of the new pair. Click the pencil that appears when hovering over the value part:

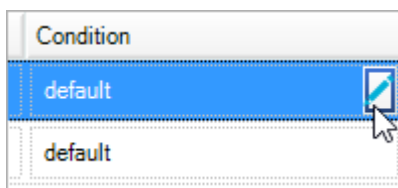


This brings up the [Select Value](#) window where you can change the value that should be used when the associated condition is true.

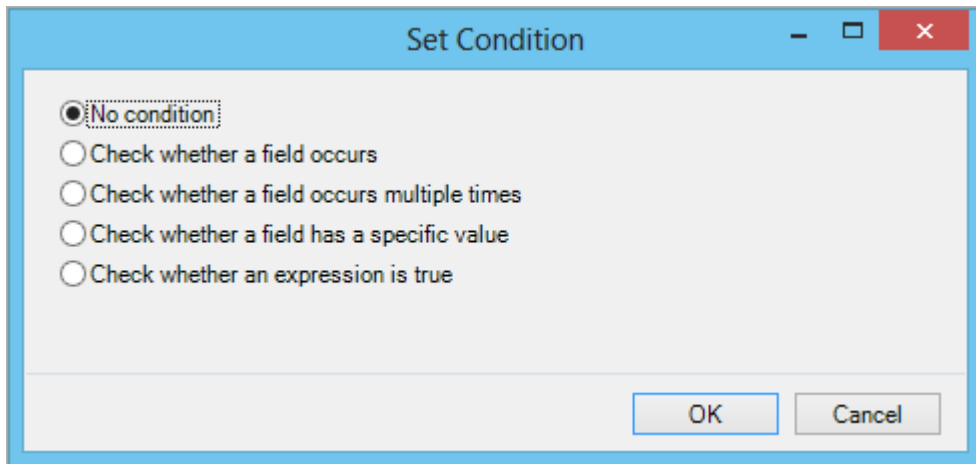


Choose [Element / attribute value](#) to select a field from your data set. Choose [Expression](#) if you want to use an expression. [This chapter](#) has more information about how to use expressions.

- Click **OK** to finalize your value and close the [Select Value](#) window.
- Next, you need to set up the condition associated with this value. Click the pencil that appears when hovering over the condition part:



This brings up a window where you can define your condition.



For more information on how to define your condition, click [here](#).

- 6) Once you have defined your condition, click **OK** to finalize it.
- 7) You have now successfully set up your value-condition pair.

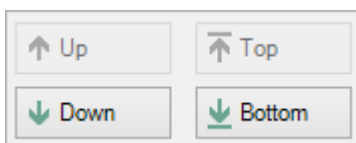
Field Selection	
Value	Condition
▶ Value of field /element/elementa	hasvalue[ $\{elementa\}$ contains green]
Value of field /element/elemento	default

Repeat steps 2-6 to set up more pairs.

- 8) Click **OK** to save the mapping's settings.

### 14.3.3 Ordering and removing value-condition pairs

You can re-order your value-condition pairs by selecting the pair you want to move and clicking **Up**, **Down**, **Top** or **Bottom**:



Finally, you can remove a value-condition pair by selecting the pair you want to remove and clicking **Remove**:



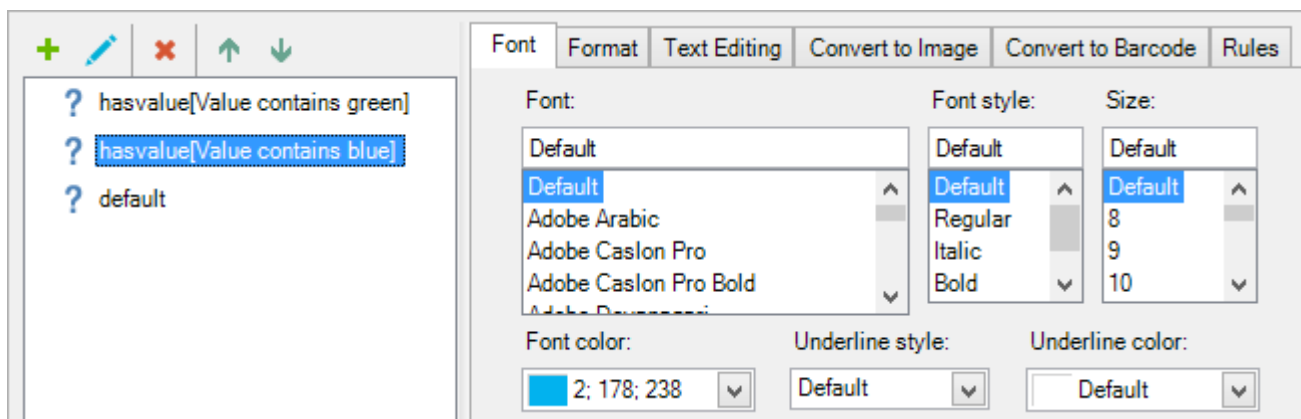


## 14.4 Conditional styling & formatting

### 14.4.1 Styling/formatting linked to conditions

Making a mapping's styling & formatting conditional is done by defining conditions that have a styling/formatting linked to them. When the document is created, XperiDo cycles through all the conditions for that mapping. The first condition that is true passes on its styling & formatting to the mapping.

The following example shows this:



On the left, you see 3 conditions. The first (top) checks whether the mapping's value contains the word **green**, the second (middle) checks whether the mapping's value contains the word **blue** and the third is the **default** (always true) condition, which acts as a fail-safe.

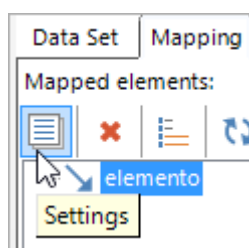
On the right, you see the styling/formatting settings for the **second condition**, since that is the one that is selected. In this case, the mapping's font color will be changed to blue if the mapping's value contains the word **blue**.

Note that everything to the right of the conditions can be changed - you can set up **Convert to image** for one condition and a simple **Format** change for another, for instance.

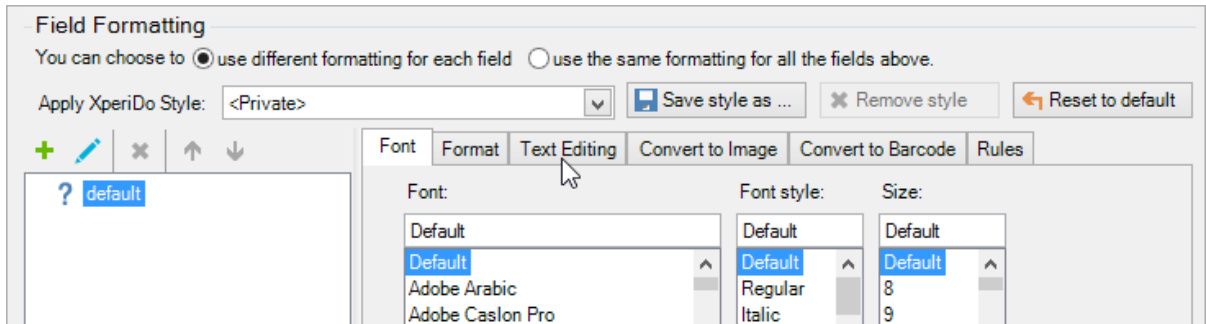
### 14.4.2 Setup

To make your mapping's styling and formatting conditional, follow these steps:

- 1) In the XperiDo pane's **Mapping** tab, select the mapping and click **Settings**.

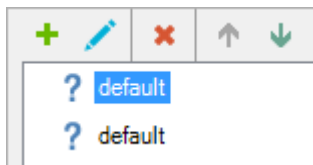


- This brings up the [XperiDo Mapping settings](#) window. The left side of the **Field Formatting** part shows the current conditions for conditional styling/formatting.

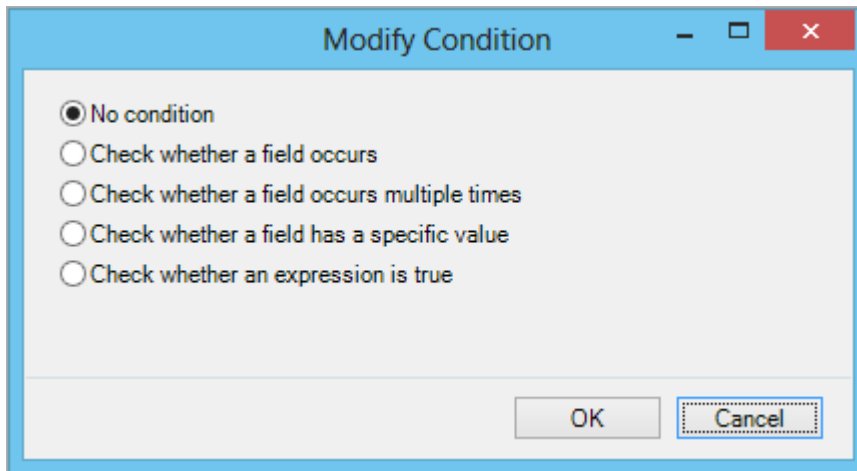


The **default** condition is always true.

- To add another condition, click [the green plus](#). This adds another default condition:

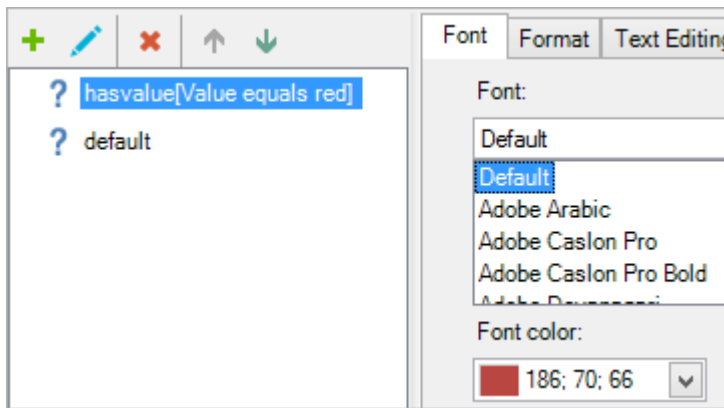


- Select the condition you wish to change and click [the blue pencil](#). This brings up a window where you can define your condition:



For more information on how to define your condition, click [here](#).

- Once you have defined your condition, click **OK** to finalize it.
- Now that your condition is set up, you can change the styling & formatting that's linked to the currently selected condition.



Repeat steps 3-6 to set up more conditions.

- 7) Click **OK** to save the mapping's settings.

### 14.4.3 Ordering and removing conditions

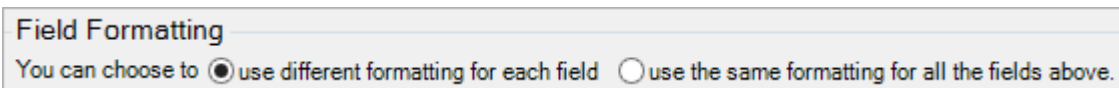
You can re-order your list of conditions by selecting the condition you want to move and clicking the **up** or **down** buttons:



Finally, you can remove a value-condition pair by selecting the pair you want to remove and clicking **the red X**.

### 14.4.4 Conditional styling & formatting in combination with conditional mapping

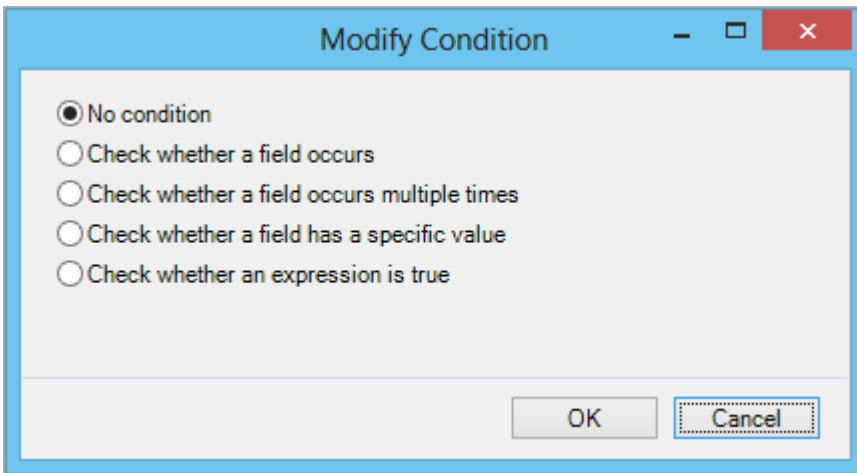
When you have set up multiple value-condition pairs in your mapping, there is a **setting** that lets you choose how you want them to interact with the multiple conditions you have set up for conditional styling & formatting:



The option **use different formatting for each field** gives each value-condition pair its own styling & formatting, allowing you to define multiple conditions for styling & formatting for each value-condition. The other option (**use the same formatting for all the fields above**) gives all your value-condition pairs the same styling & formatting.

## 14.5 Defining your condition

Whether you use a condition box, conditional mappings or conditional styling & formatting, you'll need to define the **condition**. Here are the possible conditions:



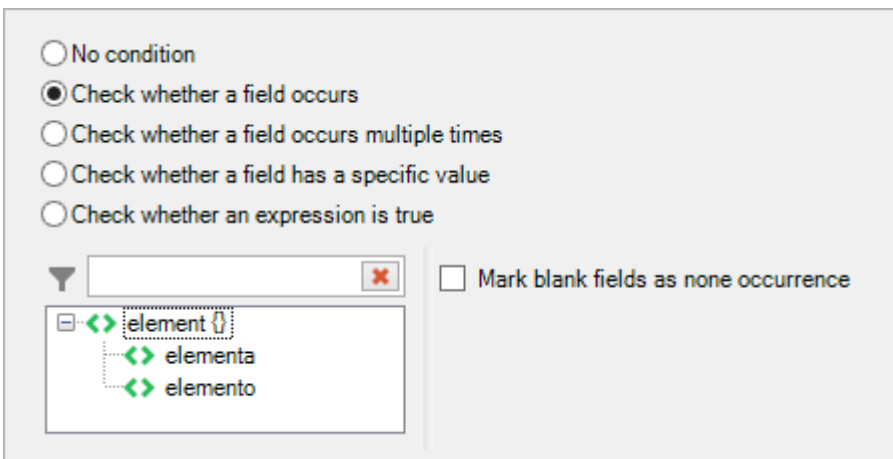
When you choose one of these, more options appear. Adjust the options to your liking, then click **OK** to finalize the condition.

#### 14.5.1 No condition

**No condition** means that this condition is always true. This is the default condition.

#### 14.5.2 Check whether a field occurs

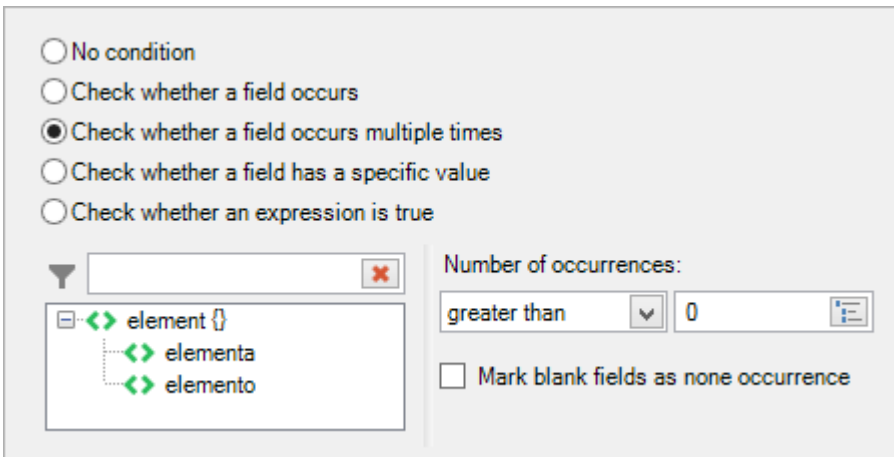
**Check whether a field occurs** checks whether a field is present in the data set.



Most XperiDo products always provide the full data set, which would render this condition option useless, since the field is always present. For that, the checkbox **Mark blank fields as none occurrence** is there: checking this will mark empty/blank fields as not occurring.

#### 14.5.3 Check whether a field occurs multiple times

**Check whether a field occurs multiple times** checks whether a field is present in your data set a number of times.



You can change the operator (greater then, less then, equal to etc.) and the number of occurrences. Instead of typing in the number of occurrences, you can refer to a field by clicking the data set button:

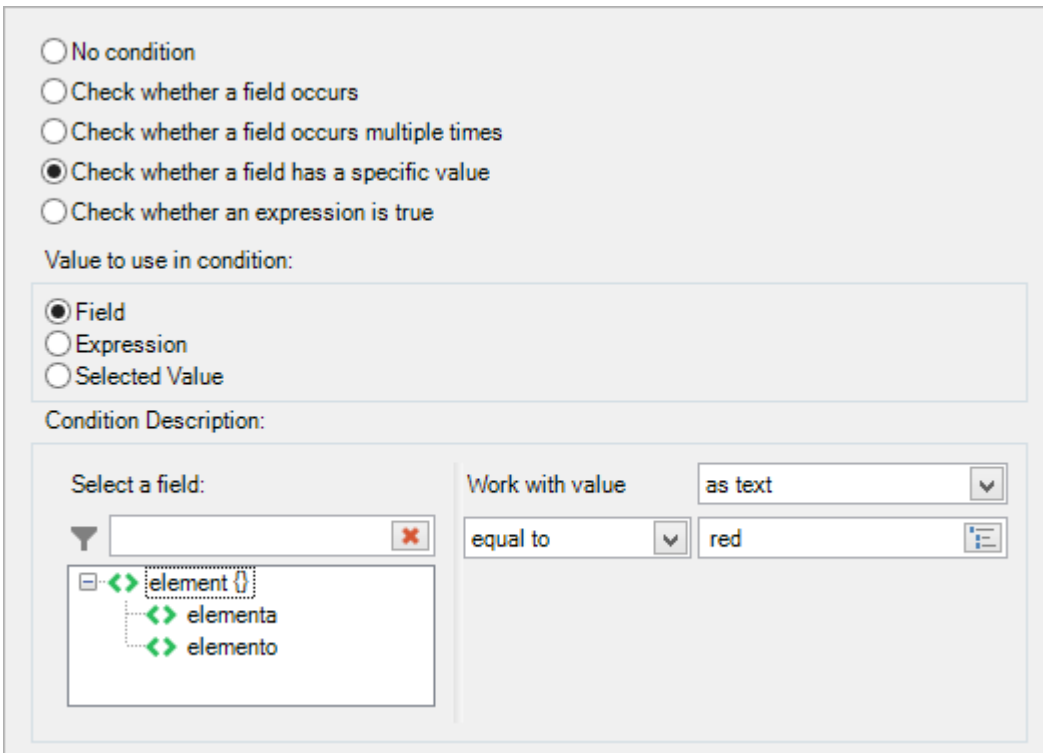


This opens a window where you can choose the field you want to refer to.

Finally, the checkbox [Mark blank fields as none occurrence](#) will mark empty/blank fields as not occurring.

#### 14.5.4 Check whether a field has a specific value

[Check whether a field has specific value](#) checks whether a field has a certain value.



Using this option requires that you specify 4 things:

- The value to use in the condition (the first value)
- That value's type
- The operator used in the check
- The value to check the first value against

#### 14.5.4.1 Value to use in the condition

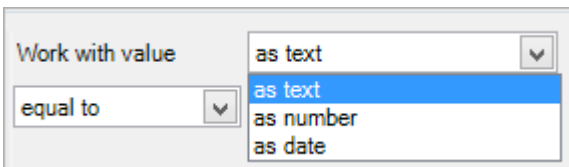
The first thing to decide here is the **value** that you wish to use in the condition. There are 3 options:

- **Field**: to check whether a field has a specific value. You can select the field in the data set view below.
- **Expression**: to check whether the result of an expression is a specific value.
- **Selected value**: to check whether the value, associated with the first true condition (in the **Field selection** part where you define your value-condition pairs), has a specific value. (only visible in the conditions for conditional styling & formatting)

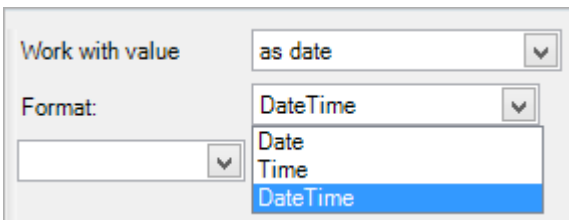
Use **Field** when you want to refer to the same field, regardless of the outcome of the **Field selection** part. If you want to consider the outcome of the the **Field selection** part, use **Selected value**.

#### 14.5.4.2 Value type

Now that you have the value you wish to use in your condition, you need to specify how XperiDo interprets this value.



This can either be **text**, **number** or **date**. Choosing **date** adds further options, allowing you to choose **date**, **time** or **datetime**:







#### 14.5.4.3 Value to check against

Now that the first value and its type is known, you need to choose the **operator** and the value to check the first value against.

Depending on the type, you have different operators to choose from:

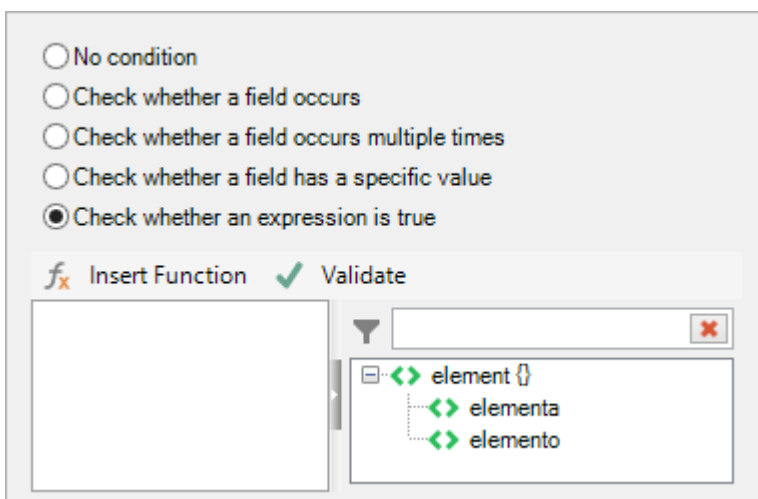
- **Text:** contains, contains not, equal to, not equal to, is blank, is not blank. These are all **case-insensitive**.
- **Number:** between, not between, equal to, not equal to, greater than, less than, greater than or equal to, less than or equal to.
- **Date:** between, not between, equal to, not equal to, after, before.

Finally, you need to choose the value. You can simply type it in (in the case of text or number), or you can use one of the following options by clicking the corresponding button:

-  **Drop-down:** when your data set restricts the options to certain values, you can select one of the options.
-  **Data set reference:** when you want to refer to the value of a certain field instead of using a static value.
-  **Time:** when you want to input a time.
-  **Date:** when you want to input a date or a datetime.

#### 14.5.5 Check whether an expression is true

**Check whether an expression is true** checks whether an expression returns true. **True** means any value other than 0, which is **false**.



[This chapter](#) has more information about how to use expressions.

## 15 Electronic signatures

The XperiDo 6.6 template design add-in introduces electronic signatures for digitally signing your document. To accomplish this, XperiDo uses the [DocuSign®](#) platform.

### 15.1 Concept

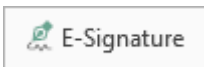
When you generate a document that contains an electronic signature, one of two things will happen:

- Either you get a link that redirects you to the signing procedure. This is called [sign in person](#), where the person that needs to sign is there with you.
- Either an e-mail is sent to the party that needs to sign the document. This is called [sign by e-mail](#).

You can insert multiple signatures in the same document, but you cannot mix [sign in person](#) with [sign by e-mail](#) signatures.

### 15.2 Inserting an e-signature

To insert an e-signature, click [E-Signature](#) in the XperiDo ribbon:



This creates an empty mapping with the digital signature option activated:

Font	Format	Text Editing	Convert to Image	Convert to Barcode	Rules	E-Signature
<input checked="" type="checkbox"/> Create Digital Signature						
<input checked="" type="radio"/> Signature <input type="radio"/> Optional Signature <input type="radio"/> Initial <input type="radio"/> Optional Initial						
<b>Recipient</b>						
Recipient:      Not configured						
<input type="button" value="Configure..."/>						
<b>Formatting</b>						
Alignment: <input type="text" value="Top Left"/>						

To use this signature, you'll need to configure it properly.

### 15.3 E-signature settings

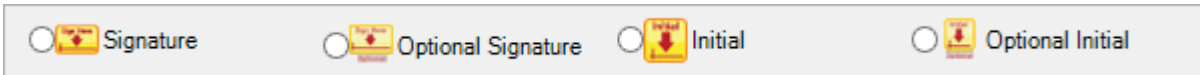
#### 15.3.1 Type

There are 4 types of signatures.



- **Signature**, where the signer signs with his/her full name/full signature.
- **Initial**, where the signer signs with his/her initials.
- **Optional signature**, which is a non-mandatory signature.
- **Optional initial**, which is a non-mandatory initial.

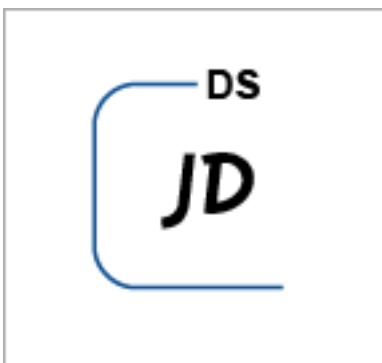
DocuSign® uses the following symbols for this:



A signature looks like this:



And this is what an initial looks like:

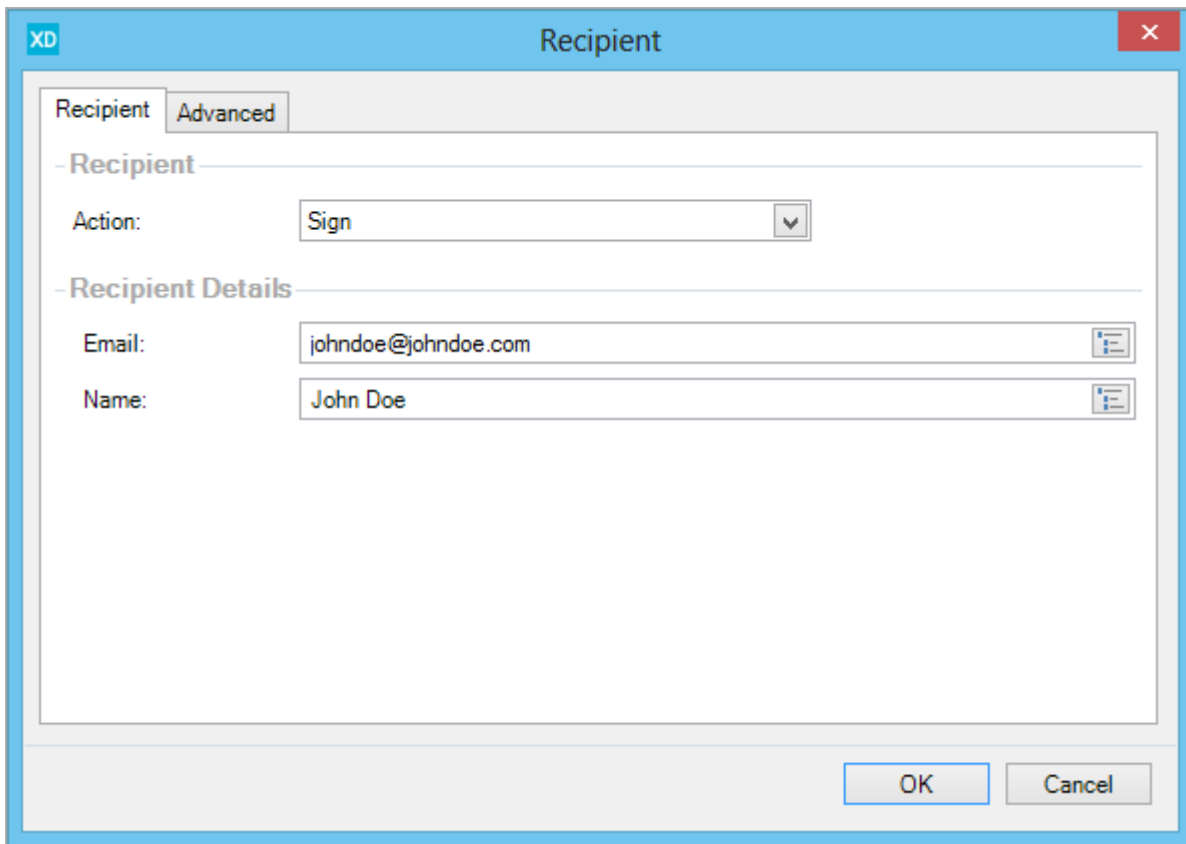


### 15.3.2 Recipient

The **Recipient** part shows who is the recipient of the signature. If no recipient has yet been set, the message **Not configured** is shown.

Click **Configure** to open a window where you can set the options for the recipient. In here, you can choose whether to **sign by e-mail** (sign) or **sign in person** (sign in person).

15.3.2.1 Sign by e-mail (sign)

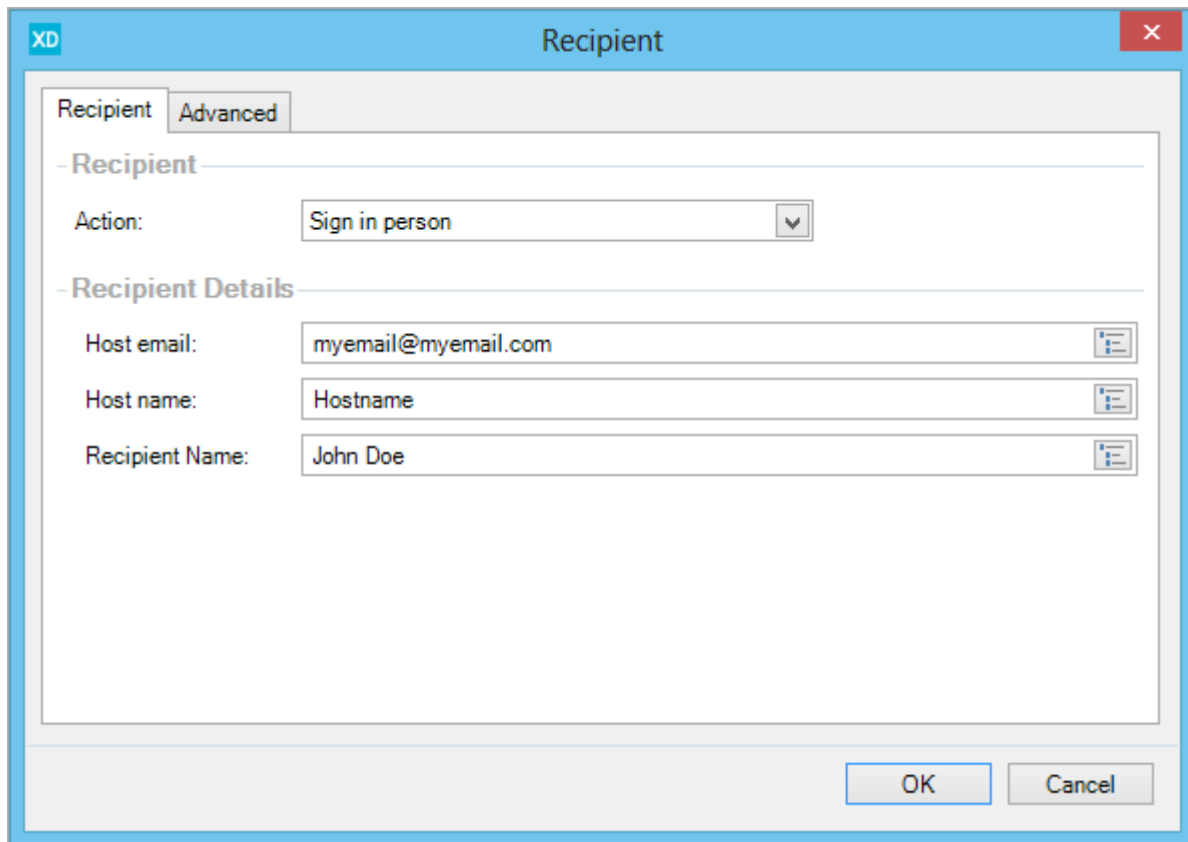


When choosing **Sign**, you have to input an **Email** and a **Name**.

- The **Email** field should contain the e-mail address of the receiver.
- The **Name** field should contain the name of the receiver.

You can also assign a field from your dataset to these fields, by clicking the buttons at the right of the text boxes.

15.3.2.2 Sign in person (sign in person)



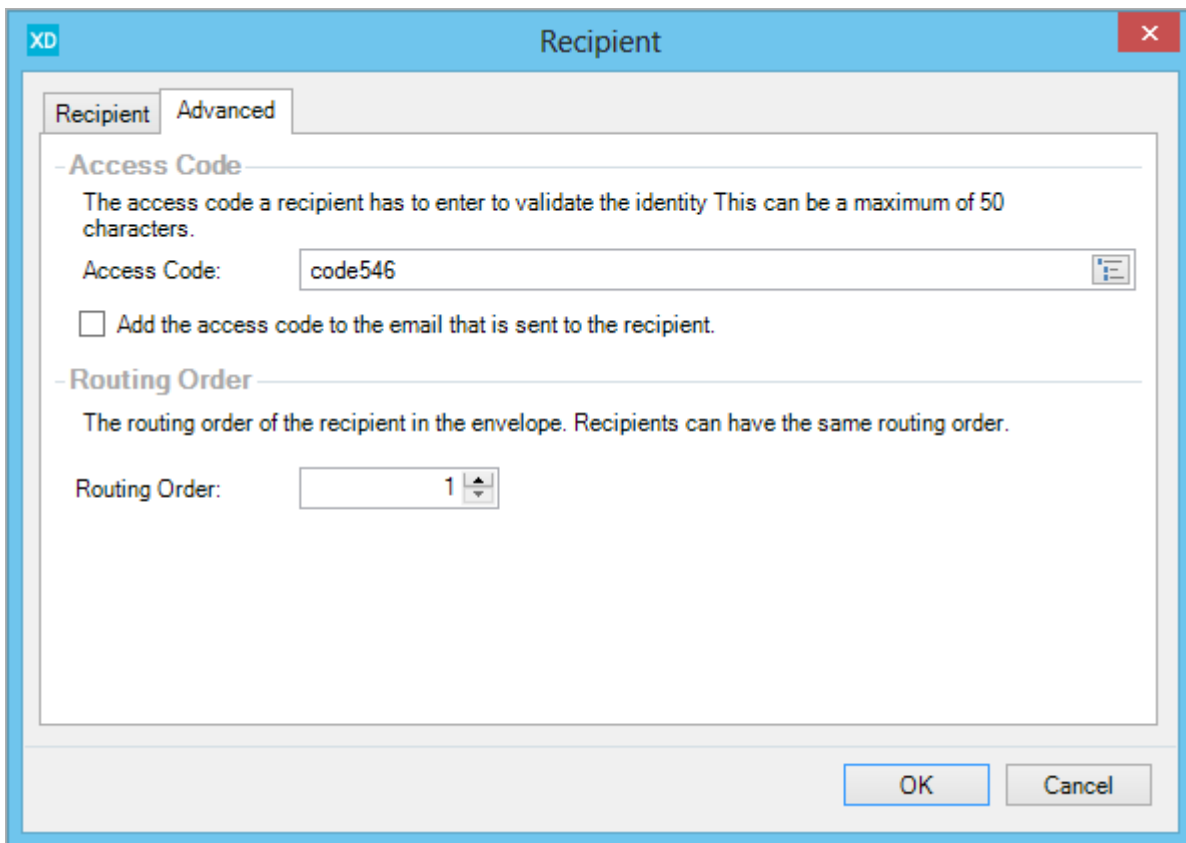
When choosing [Sign in person](#), you have to input a [Host email](#), [Host name](#) and [Recipient name](#).

- The [Host email](#) field should contain the e-mail address of the DocuSign® account that you wish to use.
- The [Host name](#) field should contain the name of the account associated with the host e-mail address that you have provided.
- The [Recipient name](#) field should contain the name of the person that is to sign the document.

You can also assign a field from your dataset to these fields, by clicking the buttons at the right of the text boxes.

15.3.2.3 [Advanced](#)

The advanced tab contains more options:



You can add an access code by typing the code in the text box next to [Access Code](#). You can also assign a field from your dataset to this code, by clicking the button at the right of the text box. Checking the box [Add the access code to the email that is sent to the recipient](#) includes the access code in the mail that is sent to the recipient.

Under routing order you can assign a [routing order](#) to each recipient. The routing order defines the order in which the recipients get asked the question to sign the document. This allows you to define who should sign first, then second etc. The person with the lowest routing order gets the document first, after which (after signing) it is sent to the person with the second-lowest routing order etc.

Recipients that have the same routing order get the document at the same time.

### 15.3.3 Formatting

When you insert a signature, it is always placed where your cursor is in the template at that time. However, a DocuSign® signature can take up some space, so you need to define in which direction it can expand.

This is best explained with an example. The following images shows how we set up a part of our document, with the [red dot](#) representing the position where we add our signature:



Depending on how you choose the alignment of your signature, it will end up differently:

Top left:



Bottom left:



Top right:



Bottom right:



By selecting the right alignment, you can make sure that there's room for your signature.