

Base documents

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Introduction

Creating many documents manually and changing the client's details (name address, specific requirements, etc.) can be quite the hassle. For this reason, the platform supports automated data assembly in documents. This gives the designers the ability to turn any business document into a "Base document" (commonly known as a template) and use it to build personalized documents automatically during any process.

The document can be filled in with content set up by the base document designer and combined with data generated during the business processes, business rules or any other data source.

Once the automatic document is generated, the file can be sent. The result is that the designers can easily build applications capable of creating documents for specific timing and users. Besides, this will boost the end user's productivity and help them to create documents in less time while maintaining accuracy and security.

This can be done in two simple steps:

1. Create the base document

First, build the base document (template) in Microsoft Word, Excel, or a rich text editor. It is possible to build dynamic content using variables, conditions, data tables, etc.

2. Generate the automatic documents

Second, automate the users document creation workflow by the click on a button to create the document needed or by setting up an automated task that is triggered whenever it is required with no human intervention.

Invoice presentation for clients

Process reference: SPN-1025.1_25

The invoices below were generated by the clients during the first trimester of the year.

Name: James Brown
 Invoice number: 12345#
 Attached files:
[User sessions.docx](#)
[Sesiones de Usuarios.docx](#)

Details of the invoice

Delivery reference	Number of articles	Price per article
23456	278	400 USD
8765	234	500 USD
2456	123	700 USD

Name: Pepe Santos
 Invoice number: 6543#
 Attached files:
[Sesiones de Usuarios.docx](#)
[Imágenes-User sessions.pptx](#)
[Imágenes Sesión de usuarios \(1\).pptx](#)
[User sessions.docx](#)

Details of the invoice

Delivery reference	Number of articles	Price per article
34567	200	823 USD
6543	123	100 USD
5674	50	324 USD

[[Frm_1_My signature]]

Example of a "Base document".

Examples of use

Generally, consider the following:

- **Base document with HTML editor.** Use them to generate automatic documents with simple formats, using simple data compositions. The main advantage is that it offers an editor integrated with the platform, it is not necessary to install additional applications.
- **Base document with Microsoft Word editor.** This editor is suitable for working with documents that require a more elaborate design, that need to work with tables and present highly structured data areas. Requires Microsoft Word.
- **Base document with Microsoft Excel editor.** Use this editor when Excel calculation formulas are needed, it is also possible to operate with panel fields if necessary. Requires having Microsoft Excel.

Next, is a scenario that requires the use of base documents:

A class of processes is going to be implemented with the purpose of sending notifications to clients, regarding the procedure of hiring an insurance policy. Once the diagram of this class of process has been defined and the points where the process must collect the information are set; the next step is to design the base documents, in order to prepare the relevant documentation for each client and send it to them. Some examples of the required base document could be:

- Welcome and thank you letter.
- Current legal documentation that governs the rights and obligations of the client.
- Conditions of the hired insurance.

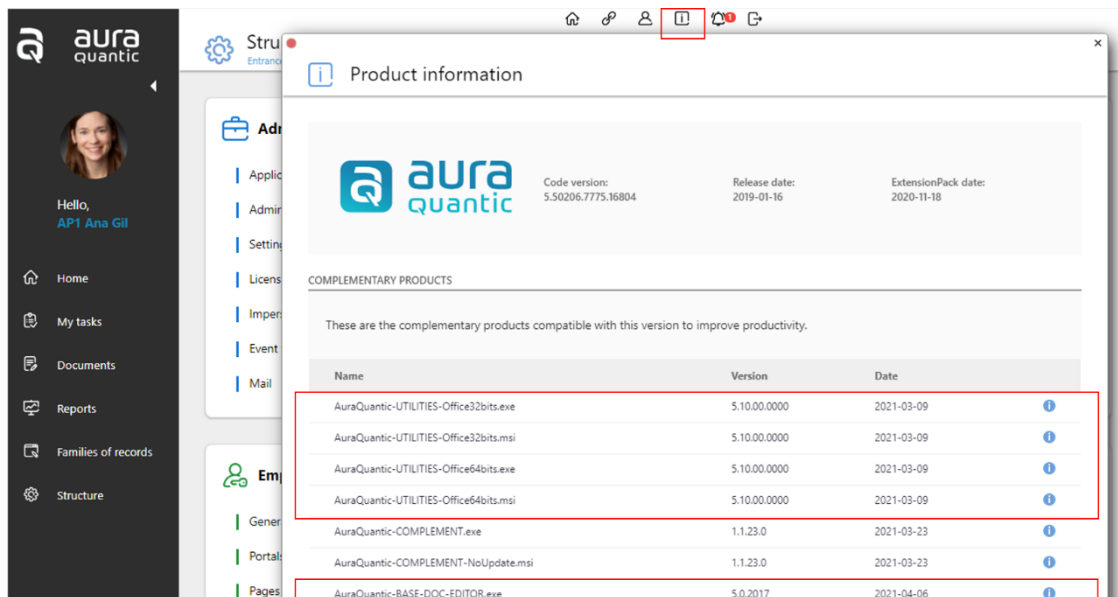
The documents indicated will have two main components, a base text that will always be the same regardless of the client who receives it, and another dynamic part, which will vary in a personalized way with the data necessary for each client.

The use of base documents defines these structures in a simple way starting from, for example, a Microsoft Word format file with the standard texts that will be the same for all clients, being able to later create and define a dynamic data structure by using the different design components that this functionality offers.

Previous requirements

The corresponding editor must be installed in the local computer where the functionality will be used, for example, if we need to work with a .docx format, a Microsoft Word license will be required and for docx formats. xls or .xlsx, a Microsoft Excel license will be needed. If we are working with .html formats, no additional application is required, since it is provided from the platform.

Additionally, if working with Word, the installation of the AuraQuantic-BASE-DOC-EDITOR utility and AuraQuantic-UTILITIES-Office is required. In the latter case it is also required for Excel, both are available for download from the start page in the default installation of the platform, by clicking on the **product information** icon.



AuraQuantic-BASE-DOC-EDITOR.exe

This application is needed in order to edit the base documents with Microsoft's Word document editor from the local computer.

Click on the link shown in the image above to proceed with its download, the file will be stored in the local computer prior execution. To complete the installation, follow the instructions that will appear on the screen.

AuraQuantic-BASE-DOC-EDITOR is compatible with the SAML authentication system, which allows integrating a single log in .

AuraQuantic-UTILITIES-office .exe

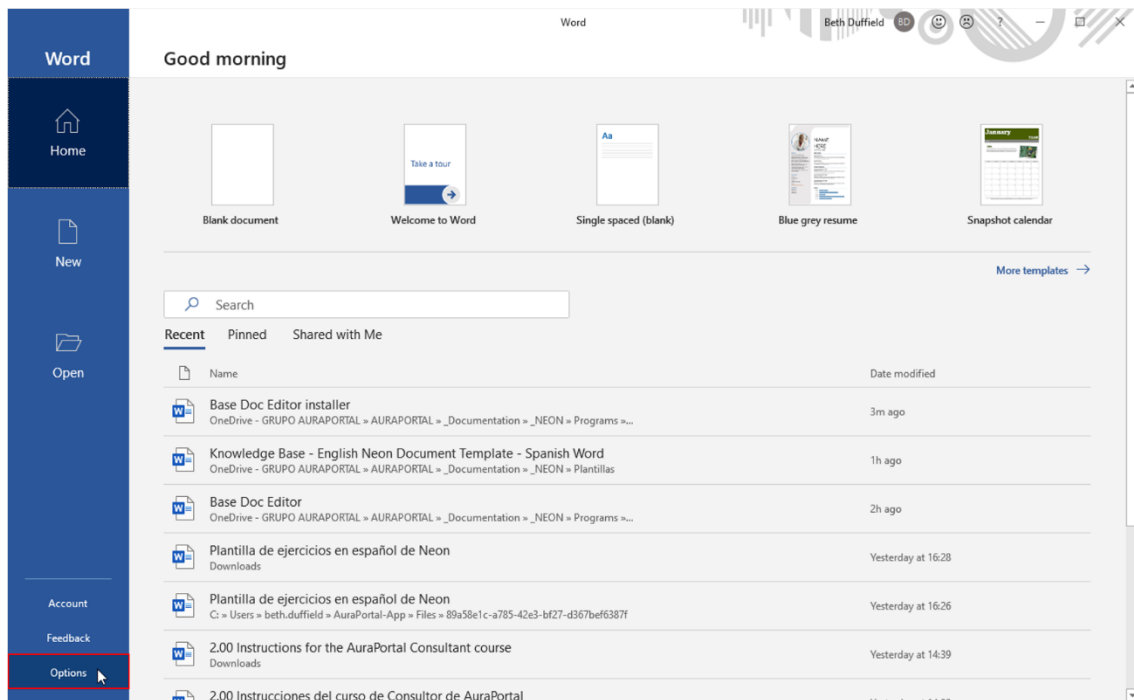
This utility installs a plug-in for Microsoft's Word and Excel applications. and enables the use and management of guaranteed and certified signatures in Word, this functionality is only available in Word.

MS Word considerations

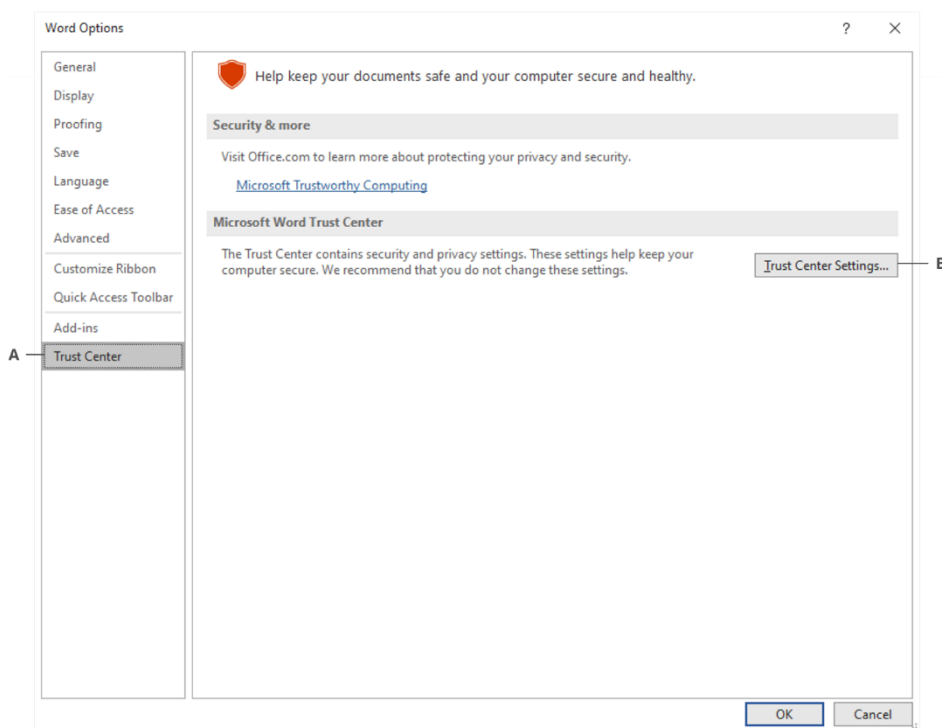
Once the Base Doc Editor has been downloaded and installed before we can start creating base documents there are certain settings in Word that must be reviewed. These are explained below.

Disable protected view

In modern versions of Word, there is a security setting called "Protected View" with several options that are enabled by default. To be able to use the Base Doc Editor these options must be disabled. To do so, open Microsoft Word and select **Options** in the left-hand panel:

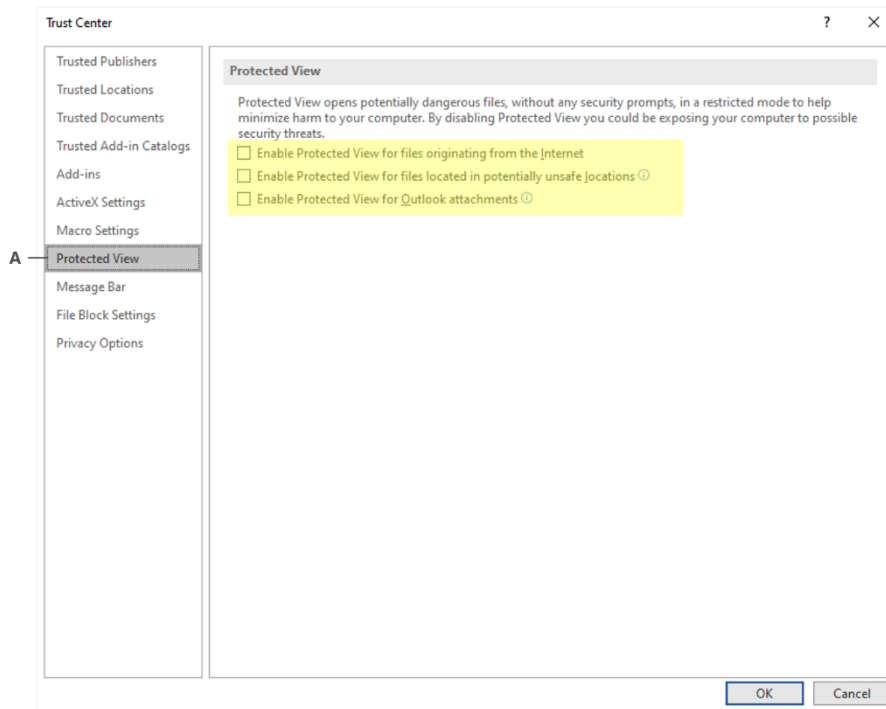


The “Word Options” window will open:



A Trust Center **B** Trust Center Settings

First select **Trust Center** in the left-hand button panel and then click on **Trust Center Settings**. The following window will appear:

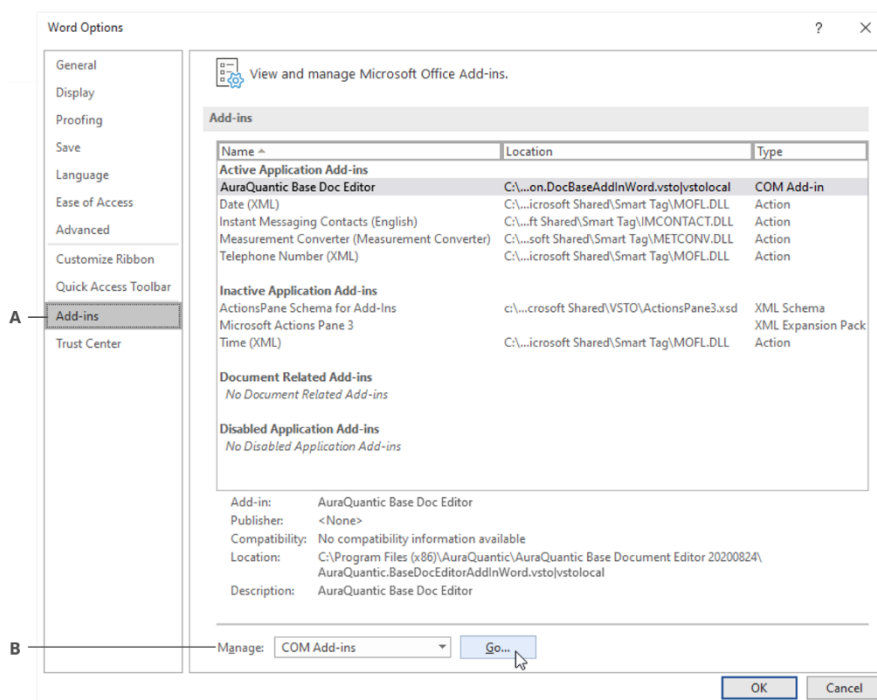


Trust Center window A Protected View

Select **Protected View** in the left-hand panel and in the panel that appears on the right, unselect the three security options, highlighted in yellow in the image. Click **OK** and the Protected View will now be disabled.

Manage Add-ins

The next step is to check that the “AuraPortal Neon Document Base Editor” add-in is available and enabled in Word. To do so, we go to the **Add-ins** menu in the “Word Options” window:



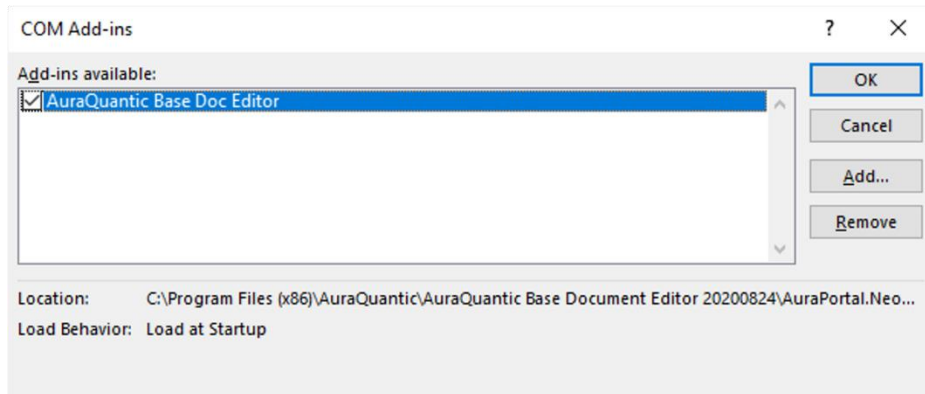
A Add-ins B Manage

In this window, we need to check the configuration of the two following options from the “Manage” drop-down menu:

- COM Add-ins
- Disabled Items

COM Add-ins

First make sure that “COM Add-ins” is selected in the “Manage” option and click **Go**. The following window will appear:

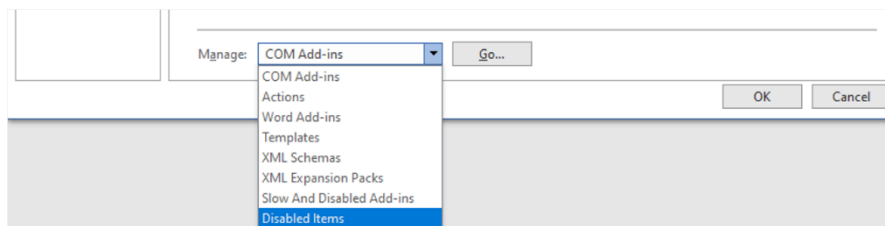


Manage COM Add-ins window.

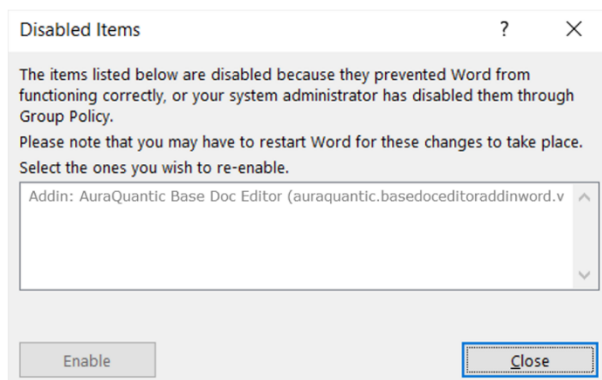
If not selected, select the **AuraQuantic Base Doc Editor** add-in and click on **OK**. The add-in will now be available.

Disabled Items

Now we need to check that the add-in is enabled. To do so, select **Disabled Items** in the “Manage” option:



Click on **Go** and the following window will open:



Manage Disabled Items window.

If the “AuraQuantic Base Doc Editor” add-in appears in the list, select it and click **Enable**.

Once we have checked and updated these settings, we will be able to create base documents in Microsoft Word.

General configuration

The most powerful functionality to design a base document is offered by the BASE-DOC-EDITOR tool, prepared for use with Microsoft Word, however it is possible to prepare simple documents using the HTML editor, and take advantage of the calculation power of Microsoft Excel when necessary, using this program as the editor of the base document along with panel fields. Next, we will see from where to access the configuration options to design the base documents. This must be from the class of processes where the designed documents will be used.

Class of processes: Example process
Entrance / Structure / Processes / Example process

SAVE SAVE AND EXIT MODE VERSIONS REGENERATE CACHE SHIELDED

IDENTITY

Name
Example process

Key	ID	Version	Reference
---	9	1	-9.1

Description

ADMINISTRATORS

Model author
Sarah Taylor (2. Manager)

Class administrator
☒ Job title ☐ Role
Sarah Taylor (2. Manager)

Administrator of each process
Sarah Taylor (2. Manager)

MODEL

- Diagram
- Version control
- Simulation
- Objects
- Base documents**
- Panel
- Comment logs
- Generic forms

EXECUTION

Mode
Development environment

Maximum number of loop recurrences
1000

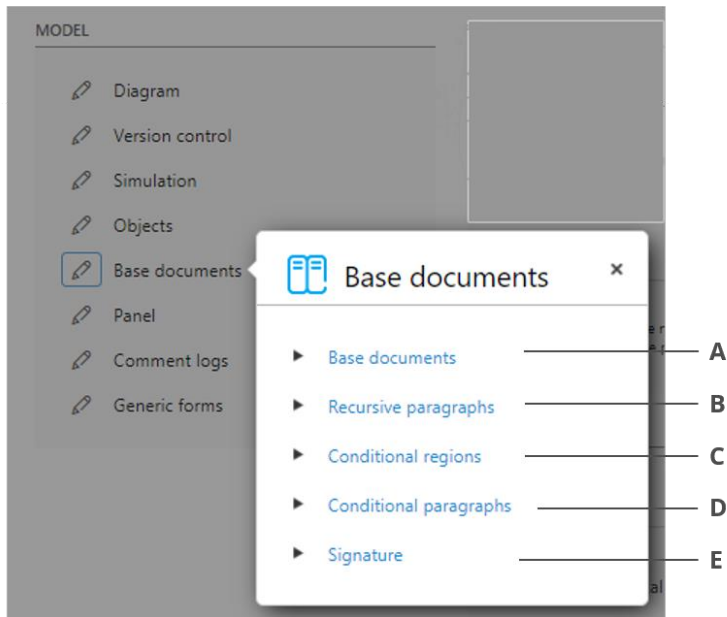
Secure room
_Open

Execution priority
0.00
The larger the number, the higher the priority

Main window of configuration for a class of processes. Featured in red is the option that allows to access the different design components for the creation of base documents.

Components of base documents

In the image below we can see that besides creating the base document, there are other options that can be configured and included in it.



A Base documents **B** Recursive paragraphs **C** Conditional regions **D** Conditional paragraphs **E** Signature

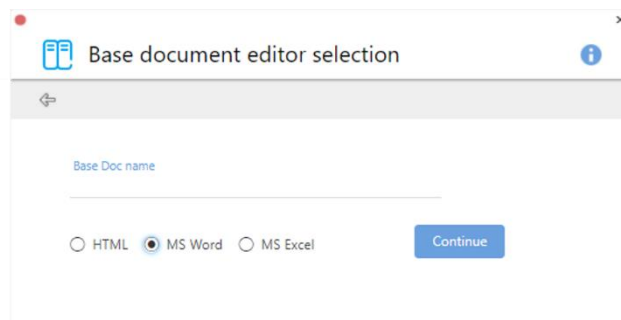
In the following sections the different design components to create the structure of the base document are explained:

Base Document

From this option we can select the type of document to use and the configuration to apply.

Formats

To define the output format of the base document, we must click on **Create document** from the “Base document” window, the initial configuration window will open displaying three options to select for the base document editor:



- **HTML.** Allows the creation of documents that can be formatted with HTML language, this editor is recommended for simple documents which do not require the more advanced functionalities offered by the MS word editor.
- **MS Word.** This editor allows the application of all the possibilities that Word offers, being able to prepare very complete documents. (It is possible to change Word documents to **PDF**)
- **MS Excel.** With this editor we can perform the creation of documents based on Excel, benefiting of all its calculation power.

Each editor configuration will be explained in its corresponding sections in this document.

After selecting the editor and clicking on **Continue**, the window will expand displaying all its configuration options:

Base document window with its configuration options.

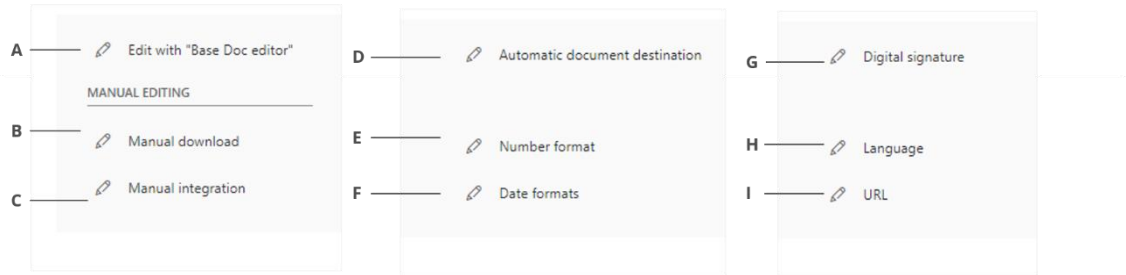
Many of these options are common for all three types of base document editors.

First section of the configuration options of base document setting's window. "Last action" is an informative field, common to all options (HTML, Word, and Excel), which indicates who and when last modified the base document.

- A. **Base Doc name.** Name that identifies the base document in the platform.
- B. **Automatic Doc Name.** Name that is assigned to the automatic document after being generated, that is, the name of the resulting file. it may or may not coincide with the name of the base document.
- C. **Description.** This field allows the introduction of an optional description for the base document.
- D. **Format.** Option to define the output format of the document that is generated automatically. The options in this case are Word (.doc and .docx), and PDF.
- E. **Add.** Allows adding more information regarding the process to the name of the automatic document, these are:
 - **Object_reference.** Add the identifier of the system task (TS) or the action button in a personal task (TP), that will generate the automatic document.
 - **Base reference.** Add the base reference of the process in which the document is generated.

- **Extended reference.** Adds the extended reference (reference plus themes) of the process in which the base document is generated.
- **Themes.** Add the topics that have been defined in the class of process and that have a value in the process where the base document is generated.

The second part of the configuration window includes the following options:



- A. **Edit with “Base Doc editor”.** Selecting this option will download the base document to be opened with the Microsoft Word desktop application for editing, all the while keeping it linked to the platform. To edit properly, it is necessary to have previously installed Base Doc Editor.
- B. **Manual download.** Option to download the base document, but not maintaining the same link with the platform, requiring the document to be manually integrated later.
- C. **Manual integration.** This option is to upload a document after its edition, in order to update the current base document.
- D. **Automatic document destination.** This is where the location of the generated file is configured, that is, the destination library where the automatic document will be integrated and /or associated to. More detail about this function is explained at the end of this section.
- E. **Number format.** Option necessary to define in which format the numbers are to be presented, affects the thousands separator (comma or point) and decimals.
- F. **Date format.** It allows to select any of the predefined date formats, in which the automatic document will show the date-type fields, both for general fields (independent), and for those found within groups of fields (in recursive paragraphs).
- G. **Digital signature.** Allows adjusting a series of configuration parameters that are applied to the digital signature image, this data is obtained from the employee record.
 - **Image size.** The original size is set by default, but a percentage can be defined regarding the size of the image that will show in the document.
 - **Signature footer** Allows activating or deactivating the footer with the full name of the user who signs, and the date and time of the signing.
 - **Signature footer font.** Indicates the size of the signature footer font.
- H. **Language.** Field to customize the language in which the options for the simple selection and multiple selection fields will be resolved, as well as the date and yes/no fields. More detail about this function is explained at the end of this section.
- I. **URL.** Provides the URL to access the base document file.

The next section of the document explains option (D) “Automatic document destination” and option (H) “Language” in the base document’s configuration window.

Automatic document destination

As mentioned previously, the window that opens when clicking on **Automatic document destination** is to configure where the document will be stored:

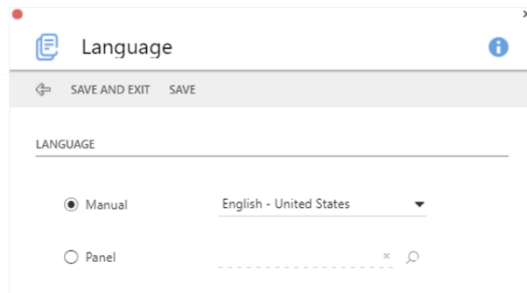
Apart from a general library type term, it is possible to select a library field included in a group of fields or even an affiliated group of fields. The destination of the document will determine both its number and its content.

- A. **Integrated into process.** This option when marked, allows a library to be selected as the destination of the automatic document. By clicking on the **Panel field** selector, the available library field options appear in a window.
- B. **Overwrite.** (For documents integrated into the processes) With the option "Yes" checked, every time the automatic document is generated and integrated into the library, the document that exists in it with the same name will be overwritten. The option "No" causes different versions of the document to be created. it is marked as "Yes" by default.
- C. **Automatic labels.** This option allows the mapping of labels with panel fields. The labels will be completed automatically with the value of these panel fields in execution. Since this is an automatic integration, only the labels marked as "Automatic" from the library configuration will be available.
- D. **Associated to process.** Allows documents to be automatically associated in the processes, creating a link to the location of the integration.
- E. **Panel field.** From this selector we will indicate the destination field for the automatic association of the generated document.
- F. **Container enabled.** When the destination of the automatic document is a library term in a group of fields, it is possible to define a specific container that for this group of fields in its configuration. This option is only valid with a group of fields.
- G. **Overwrite.** (For documents associated to the processes) By selecting **Yes** in this option, each time an automatic document is generated, it will overwrite the previous version of the same document. The option "No" will enable the creation of new versions of the same document.

Note: A panel field in a group of fields cannot be selected as destination for "Integrated into process" and "Associated to process" simultaneously. One or the other must be selected.

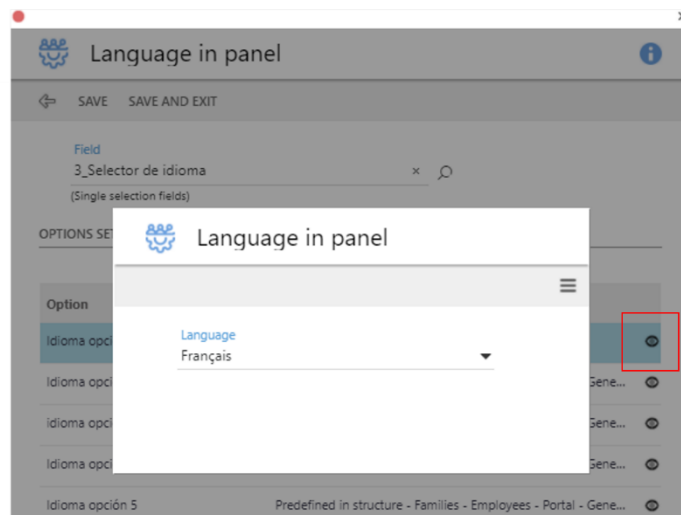
Language

In the “Language” window we can either input the language manually (defining it as fixed) , or dynamically by selecting a panel field.



Language selection window, in which we can define manually a fixed language or a dynamic language, by selecting a panel field.

If we choose dynamic input of the language by selecting a panel field, a window will open listing the simple selection fields available in the panel. By clicking on the viewer icon beside each field, we can select a language from amongst the available, to be applied to the selector.

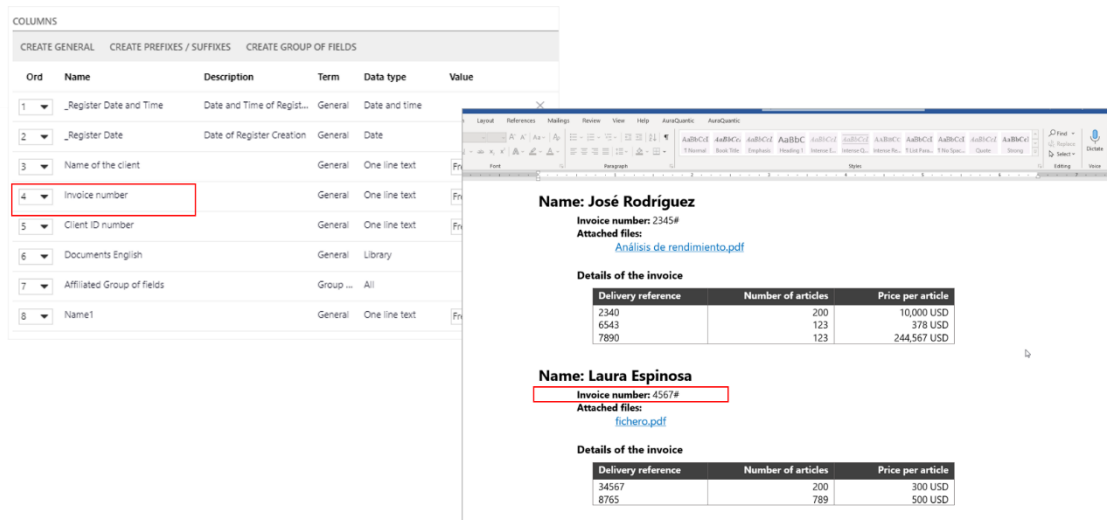


Window to select “Simple selection” fields from the panel, which will enable the dynamic definition of the language applied in the base document.

According to the data that is managed in the class of processes and what is needed in the base document, we will configure the characteristics or design components, in order to include and structure them properly in the document. In addition to the base document itself, there can be the components listed in the sections that follow.

Recursive paragraphs

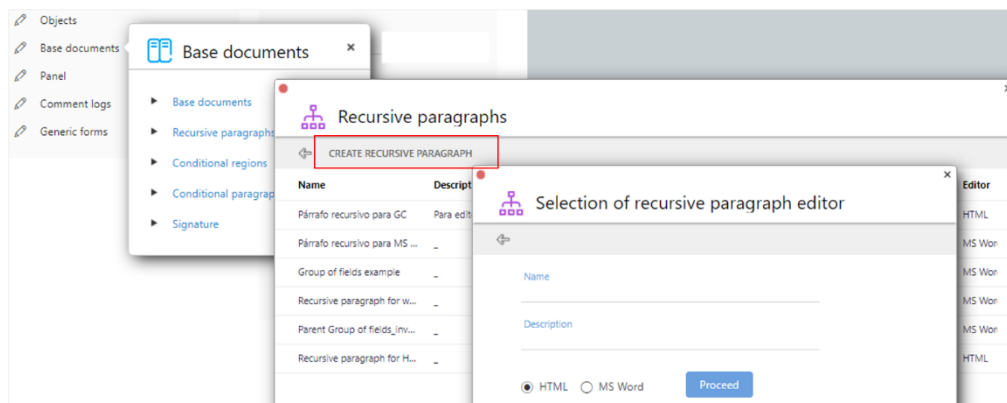
Recursive paragraphs are used to lay out in a document the content of all the lines of a group of fields or container, by the definition and use of a specific structure in the document. There is also the possibility of using an affiliated group of fields.



Example of a group of fields inserted in a base document with the use of a recursive paragraph.

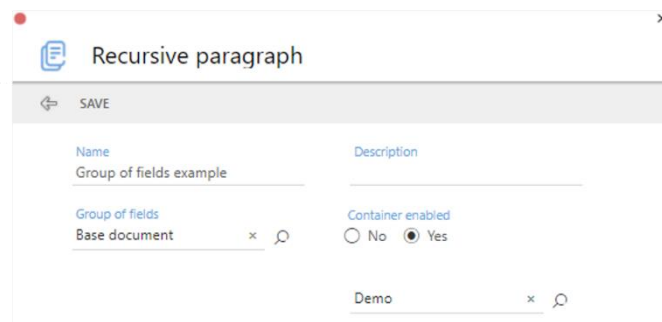
Create and define recursive paragraphs

Once this feature is selected from **Class of process > Model > Base document > Recursive paragraph**, a window will open listing the available recursive paragraphs, we can click on one to open and edit it, or create a new one, according to need. After clicking on **Create recursive paragraph** the "Selection of recursive paragraph editor" window will open.



"Recursive paragraph" window to select or "Create recursive paragraph", introduce the name value, optional description and select the editor.

The configuration window of "Recursive paragraphs" will open when we click on the **Proceed** button:



The group of fields must be indicated, as well as the applicable container (when needed).

Steps to follow for its use in a document

The steps to follow for the creation and definition of a recursive paragraph in the design of a base document are as follows:

1. Create the recursive paragraph from the configuration window in the class of processes.
2. Configure the group of fields / container to apply in the recursive paragraph.
3. Open the base document and add the desired recursive paragraph.
4. Select the fields the group of fields that will appear in the document and form the recursive paragraph.
5. Position the fields in their corresponding place in the document.

Recursive paragraphs with an affiliated groups of fields

It is possible to create "Affiliated groups of fields" from within a "Parent" group of fields, with a maximum level of affiliation; that is, "Parent" groups of fields can have many affiliates, but an affiliated group of fields cannot have more affiliates.

Creating a recursive paragraph containing an affiliated group of fields is similar to a recursive paragraph, the difference relies in that if the group of fields added to the recursive paragraph contains affiliated groups, the latter will also show in the document.

An example would be a "Parent" group of fields that contains a list of *invoices*, and an affiliated group of fields that contains the related delivery notes.

In execution after the automatic document is created, we will see one line of the "Parent" group of fields; *Invoices*, and all the related lines of the affiliated group of fields; *Delivery notes*.

Conditional Regions

A conditional region permits the selection of a certain part of a base document, where we will add conditions. This conditioned selection will only show in the automatic document, if the previously established conditions are met, in accordance with the previously defined structure in the base document.

Creating and defining conditional regions

In the image below, we see an example in the configuration of a conditional region that will appear in the automatic document, if the conditions are met, the clients whose purchase value is above 20.000 will be visible. The rest will not show.

To define this component, click on **Create conditional region** and complete the fields and options presented in the "Conditional region" window:

Settings window of a conditional region. Once the conditional region is created and saved, the access to the configuration of the specific conditions is enabled from the "Conditions" button.

Conditional paragraphs

Conditional paragraphs allow conditions to be defined in lines of recursive paragraphs, or in portions of a paragraph in a base document, these selections will show if the conditions established in them are met once the automatic document is generated, in accordance with a previously defined structure in the base document.

Creating and defining a conditional paragraph

In the image below we can see the definition of a conditional paragraph that will display the *clients with level 2 security* in the automatically generated document, if the established conditions are met, the rest will not show.

To define this component, click on **Create conditional paragraph** and complete the fields and options presented in the "Conditional paragraph" window.

Configuration window of a conditional paragraph. Once the created conditional paragraph has been saved, access to the configuration of the specific conditions is enabled from the "Conditions" button.

When this configuration is applied to a text paragraph, the definition label of the conditional paragraph must be placed immediately before the first letter of the conditioned text with no intros in between. The effect of the condition will extend up until the next intro.

Signature

This option allows setting conditions to a “Guaranteed Signature”, this is applicable to scenarios where we need different signatures according to the documents specification. The required signature field will be visible in the automatic document, only if the established conditions are met.

The signature sequence is as follows:

1. The first step is to generate the automatic document in Word format.
2. The user who is going to sign must open the document in the library.
3. The signature field must be positioned correctly in the document (if not already allocated in the document).
4. After, select the “Guaranteed signature” option from the AuraQuantic menu.
5. Finally, Introduce the PIN to sign (if previously configured).

The completion of step 3 depends on whether the base document includes or not the allocation of the guaranteed signature. The latter is accomplished by selecting the option, “Allocate guaranteed signature” from the AuraQuantic menu, allowing the immediate application of the signature, (If the allocation has been previously configured in the base document, step 3 will not be necessary.)

It is possible to select a panel field to store the signature confirmation in the process, this way the signature can be confirmed without opening the document.

Creating and defining the signature

In the image below we can see the creation and definition of a signature space. If the conditions that we have defined in "Conditions" are met, the guaranteed signature will be displayed.

To define this component, click on **Create signature**, and complete the fields and options in the "Signature" window. Once the automatic document has been signed, the image defined by the user as a signature will be visible in the document. The PIN that protects the application of the signature might be required in order to sign, the PIN can be located in the employee record, If there is not a PIN previously defined, it will not be required to sign.

The image displays two screenshots of the 'Signature' configuration window. The top screenshot shows a table with one entry: Number 1, Name 'Aplica firma garantizada', and Description 'Aplica la firma garantizada si existen 3 líneas o más en el Grup...'. The bottom screenshot shows the form fields for creating a signature: Number (2), Name (Apply gaurenteed signature), Description (Apply gauranteed signature if there are three or more lines in a group of fields), and a 'Signature confirmation field' (Resultado de ejecución). It also shows a 'Conditions' section with '(Signed >= 1)'.

Window for defining a signature. Once the created signature is saved, access configuration of the **conditions** button to configure specific conditions. Note the field “Signature confirmation field”, which allows to save the confirmation of having applied the signature to the document.

For more information on how to generate and administrate signatures, consult the Knowledge base.

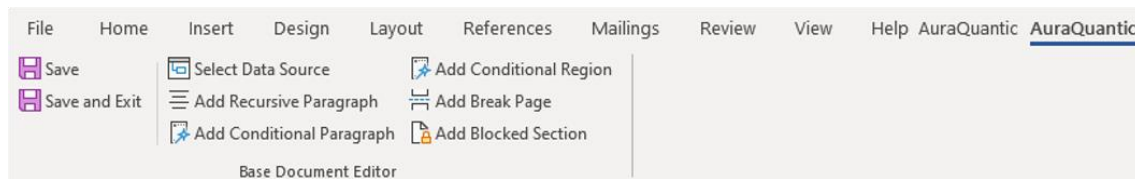
Creating a document in MS Word

After opening one of the Office applications, after installing the base document editor (AuraQuantic-BASE-DOC-EDITOR), and if necessary AuraQuantic-UTILITIES-Office, we will see that one or two options are available in the title bar, depending on previous installation.

The following functionalities are only available for the Microsoft Word editor.

How to use the options available in the Word editor

If the base document editor is installed, the following menu will be available:

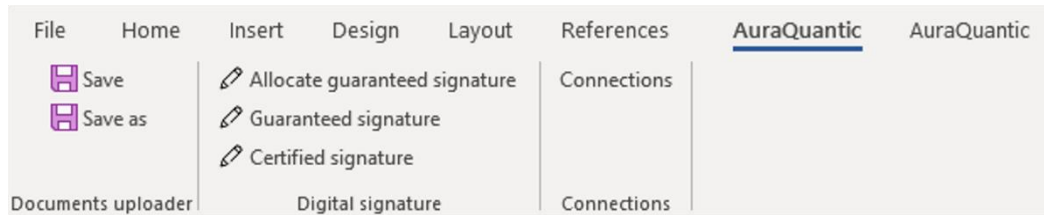


In it, we find the following options:

- **Save.** Saves the base document with the latest changes applied, keeps it in edit mode.
- **Save and exit.** Save the base document with the latest changes applied, closing its edition.
- **Select data source.** From this option it is possible to select general fields, comment logs and rules that are in the panel of the class of processes, where the base document is been edited or designed. This option is to select the desired fields and then with the cursor locate them in their corresponding positions in the document, according to design.
- **Add recursive paragraph** This option is to add a "Recursive paragraph" to the base document. The recursive paragraph must have been previously created from the "Base document" tab in the main configuration window. (See more information in the corresponding section of this document).
- **Add conditional paragraph.** Allows defining certain lines (all or in part) of a recursive paragraph as conditional paragraphs. This way, only the lines and paragraph sections that meet the established conditions will show. (See more information in the corresponding section of this document).
- **Add conditional region.** Allows defining selections of the base document as conditional regions. This way, only the selections of the document that meet the established conditions will show. (See more information in the corresponding section of this document).
- **Add break page.** After clicking on this option, the double arrow characters ">>" will be included at the point where the cursor is located. This means that, in execution, these characters are interpreted as a page break. This is a visual aid to allow better control over the exact place in the document to place an element, regardless of changes in format due to recursive paragraphs, conditional regions, etc.
- **Add blocked section.** Add the braces "[{" and "}" both at the beginning and at the end of a section for it to be blocked, all the content within it, will be read-only. Adding a blocked section allows protection of that particular section. All content located between its special characters will be seen in the automatic document as "non editable" and cannot be modified or deleted.

Signature management options

Next is a brief review of what this additional menu offers, after installing UTILITIES.



- **Save.** Saves the base document with the latest changes applied, keeping it in edit mode.
- **Save as.** Saves the base document with the latest changes applied, making a copy of the current document to save with a different name.
- **Allocate guaranteed signature.** It is necessary to use this option as a previous step to apply the guaranteed signature to a Word document. We must add at least one location.
- **Guaranteed signature.** Performs the action of signing the Microsoft Word document with a guaranteed signature. After clicking on it, all the locations pending signature will show.
- **Certified signature.** Performs the action of signing the Microsoft Word document with a guaranteed signature. It is necessary to have previously installed a Word certificate, although its installation can be facilitated, if need be.

Next is an example of how to create and structure a base document, using some of the available design features, through the Microsoft Word editor and the BASE-DOC-EDITO utility following the step-by-step instructions.

Step 1. Choose the editor

As mentioned previously, the first step is to select the editor, in this case it will be the Word option, which is the most recommended for the majority of documents, especially those that contain text and that require values available in the panel.

From the main configuration window of the class of processes, we go to **Model > Base document > Create document > Select base document**, then we will introduce the name value and mark the Word option.

Name	Description of base document	Format
Presentación de facturas	-	PDF (.pdf - Adobe Acr...
Riesgo de cliente	-	MS Excel (.xlsx)
Facturas de clientes	Muestra un listado de las facturas emitidas	MS Word (.doc)
	-	MS Word (.doc)
Client invoice	-	MS Word (.doc)

Featured is the name of the base document.

Step 2. Configure the options

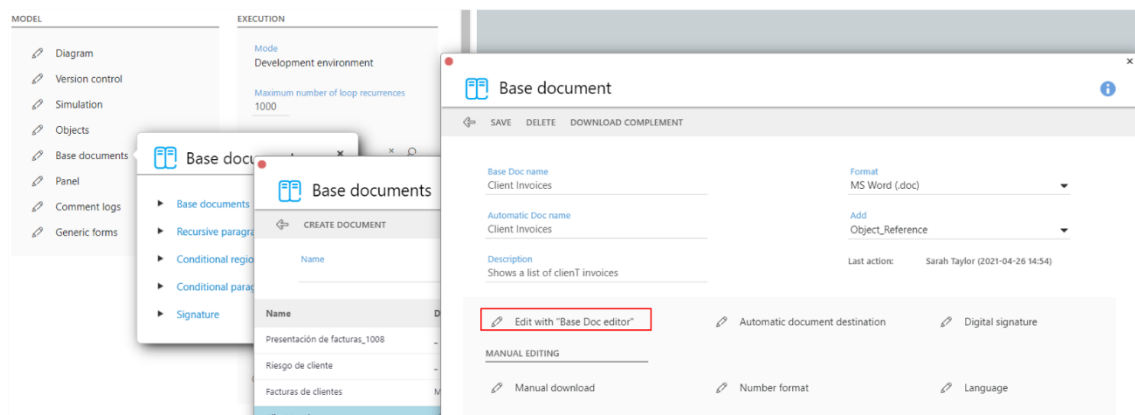
As seen previously, there are a series of options that must be configured to create the base document, such as: destination of the automatic document, the language of the selectors, the date and number formats, the output format and optionally, the addition of default data to the name of the resulting file.

Step 3. Configure the Characteristics

As already indicated in this document, depending on the data managed in the class of processes and what is needed in the base document, we can configure the characteristics or design components, to include them and structure them appropriately in the document. In addition to the base document itself, there can be recursive paragraphs, recursive paragraphs with affiliated groups of fields, conditional regions, conditional paragraphs, and the document signature.

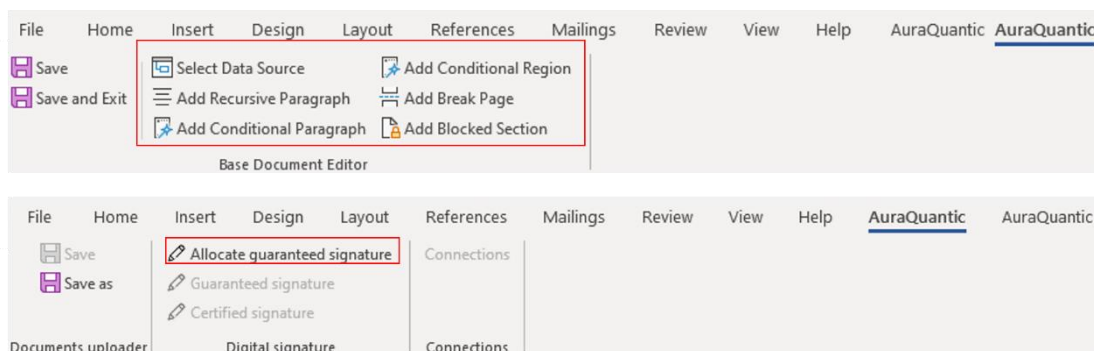
Step 4. Structure the Word base document

Once all the design components for the base document are configured and available, they must be located in the base document in their required positions.



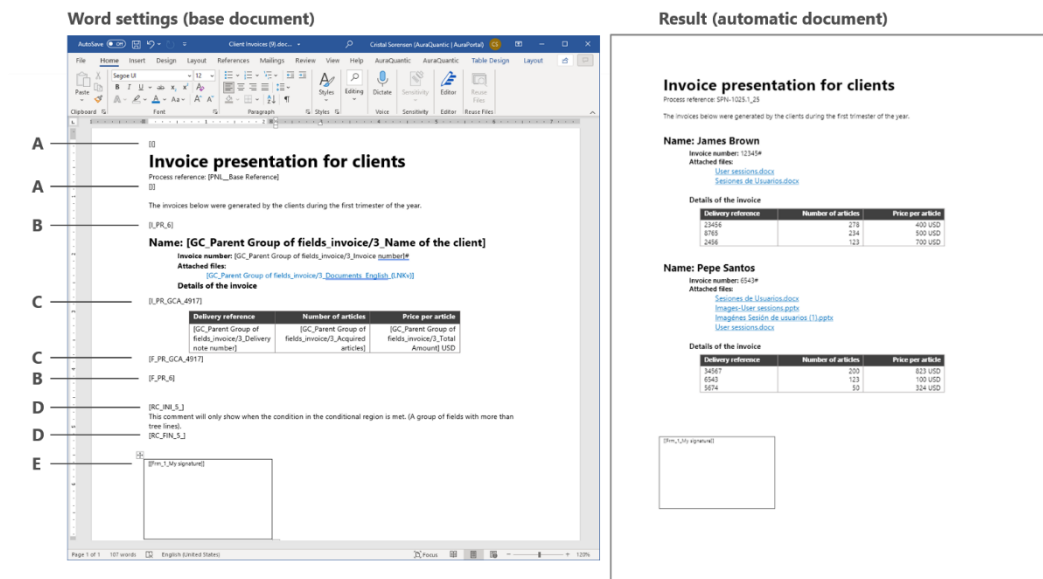
Base Document configuration main window. Featured in red is the option to directly edit document, after downloading the Base Doc Editor utility for Microsoft Word.

With the Microsoft Word editor, the open document and the AuraQuantic menu options offered by the Base Doc Editor tool, we will begin to add our components:



Once the components are created, they can be added to the base document.

Once the components have been added, we will see a structure defined by a series of internal codes and regular text, as can be seen in the image below, where the codes of the design components are visible in the document on the left.



Design view of a base document on the left and on the right the results.

In the image above we have the following components:

- Blocked section.** The user will see this as "read only" in execution.
- Beginning and end of the recursive paragraph of the group of fields.** It delimits the area in which the values in the indicated group of fields will be resolved.
- Start and end of the recursive paragraph of the affiliate group of fields.** It delimits the area in which the values in the affiliated group of fields will be resolved.
- Start and end of the conditional region.** The existing text that is in the area defined between the start and the end will be visible if the condition defined in the region is met.
- Guaranteed signature space.** In this example, there is only one signature, but it is possible to create several, so that one or the other will show, depending on whether the conditions defined in its configuration are met.

In the image below, the panel fields of the group of fields and the affiliate group of fields are added to the base document. The user will input their values in the form when creating the final document.

[I_PR_6]

Name: [GC_Parent Group of fields_invoice/3_Name of the client]

Invoice number: [GC_Parent Group of fields_invoice/3_Invoice number]#

Attached files:
[GC_Parent Group of fields_invoice/3_Documents English_(LNKv)]

Details of the invoice

[I_PR_GCA_4917]

Delivery reference	Number of articles	Price per article
[GC_Parent Group of fields_invoice/3_Delivery note number]	[GC_Parent Group of fields_invoice/3_Acquired articles]	[GC_Parent Group of fields_invoice/3_Total Amount] USD

[F_PR_GCA_4917]

[F_PR_6]

[RC_INI_5_] This comment will only show when the condition in the conditional region is met. (A group of fields with more than tree lines).
[RC_FIN_5_]

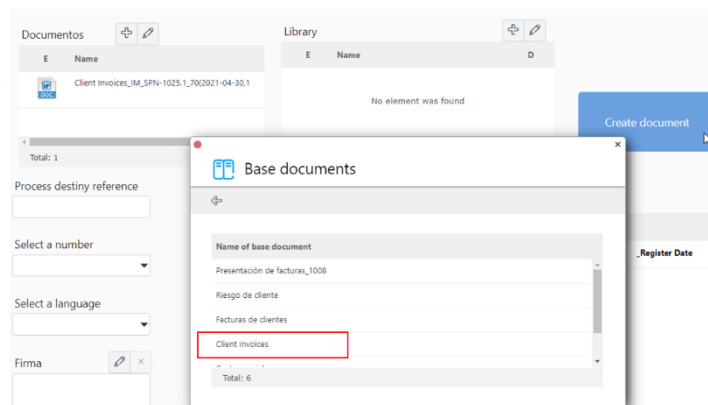
A Field displayed in a vertical format. **B** Fields displayed horizontally in a chart.

Step 5. Configure the creator

With the structure of the base document defined, the next step is to configure the objects in the class of processes that will generate the automatic document. The options available are:

- **Button in form.** The button can be executed from a form in a personal task, a start or intermediate message event. The documents will be created when the user clicks the button.
- **System task.** The documents will be created automatically when the current of the process flows through the system task UPLOADER -"Create automatic documents" function.

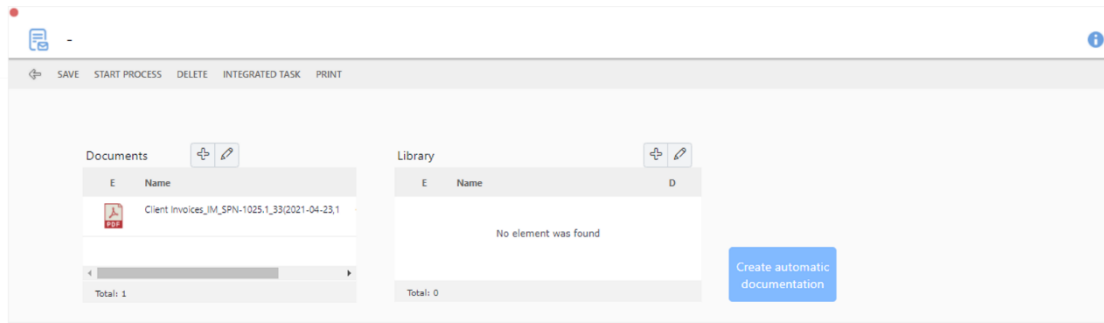
Button configuration is explained in the document "Action buttons", which describes the configurable actions in action buttons. On the other hand, the configuration of the system task is described in the document "UPLOADER system task", available in the Knowledge base.



Button with the action configured to create base documents in a form.

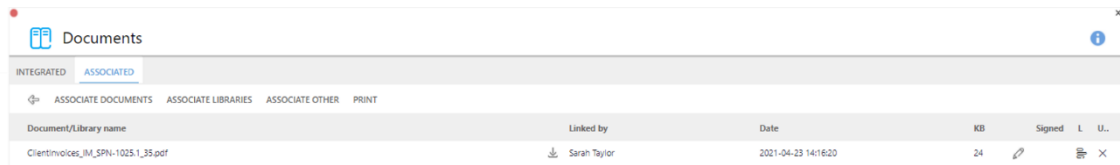
Step.6 Test and improve

The last step left is to preview the document obtained and make any necessary adjustments. It is important to run as many tests as needed to ensure the desired results. If we consult the library destination of the automatic document, we will see the following:



Library viewer "Documents", which has been used as the integration destination of the generated automatic document. The "Library" viewer seems empty; however, it is the automatic document association destination.

In this example inside of the library in the "Associated" tab, there is a link to the location of the automatic document:



Creating a document in MS Excel

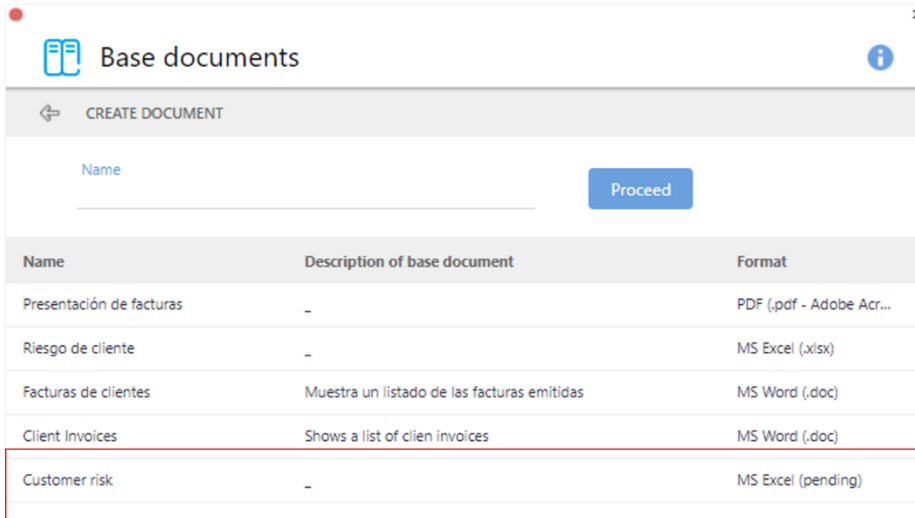
This base document format is applicable to scenarios where we need to work with certain values in the panel fields, but additionally benefiting from the calculations provided by Microsoft Excel and successively retrieving data from the processes. The latter action is performed by the CONECTOR system task. For more information about this type of system task, consult the Knowledge base.

Documents of this type only admit singular fields located in the process panel where the document is being designed. The allocation of the fields is performed manually by the designer, making use of a specific characteristic that must be added to the internal name: "[PNL_]," this is explained with more detail further down in this document.

The next sections indicates how to structure the base document with the Excel editor, in order to resolve the values, present in the panel of the class of processes.

Configuration of the Excel base document

The first step will be to select the editor which we are going to use in the creation of the base document structure. In this case we must mark the Excel option, that is most adequate for scenarios that require the use of calculations with a certain complexity.



Base documents

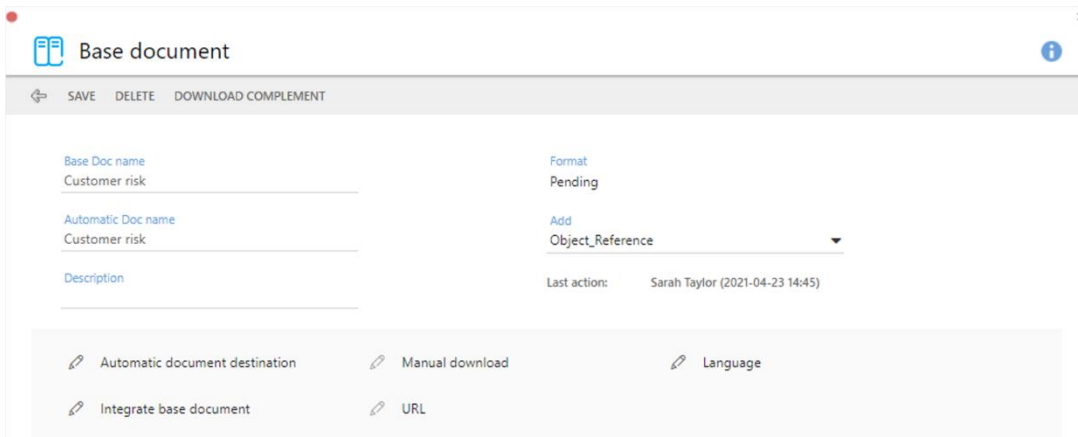
CREATE DOCUMENT

Name Proceed

Name	Description of base document	Format
Presentación de facturas	-	PDF (.pdf - Adobe Acr...
Riesgo de cliente	-	MS Excel (.xlsx)
Facturas de clientes	Muestra un listado de las facturas emitidas	MS Word (.doc)
Client Invoices	Shows a list of client invoices	MS Word (.doc)
Customer risk	-	MS Excel (pending)

Featured is a base document in Excel format.

To create a document in Excel format, from the class of processes configuration panel, open **Base documents** and click the **Create document** button, select the editor, and introduce the name value, the following configuration window will expand:



Base document

SAVE DELETE DOWNLOAD COMPLEMENT

Base Doc name:

Automatic Doc name:

Description:

Format: Pending

Add:

Last action: Sarah Taylor (2021-04-23 14:45)

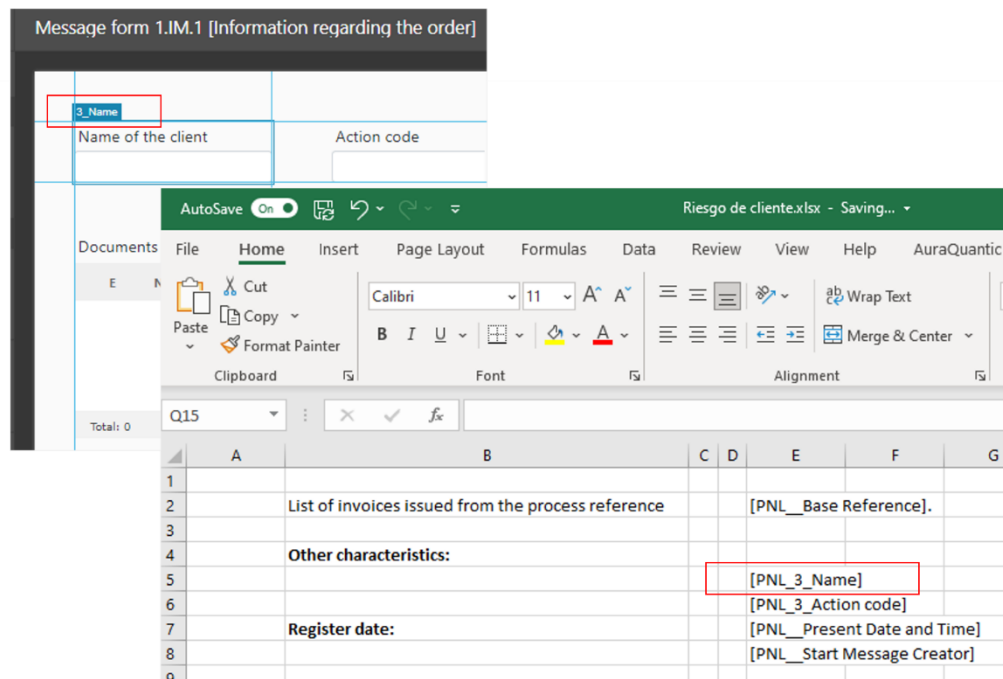
Configuration options:

- Automatic document destination
- Manual download
- Language
- Integrate base document
- URL

Configuration options for creating a base document with Excel,

The options in this image are explained in the section "Base document components" in this document.

After the main options are set in the configuration window, the Excel template requires manual completion of the panel fields to input (Excel must be available on the local computer). For example, if in the panel of the class of processes there is, the internal field: "**3_ Name**", in the document it must be designated as follows:

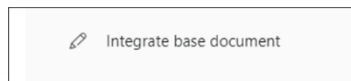


The field "Name of the client" has the code 3_Name, this is the code we place in excel after "PNL".

That is, the following notation should be applied:

[PNL_3_Internal-name-of-field]

When the document's design is complete, it must be "integrated manually" using the following button:



Next, we will proceed with the creation of the "Creator" of the automatic document as explained in the corresponding section of this document, which must be a button in a form, or an UPLOADER system task. Finally, we must evaluate the document's final results to make sure everything is working as planned. In the image below, a series of singular and system fields from the panel of the class of processes have been used.


	A	B	C	D	E	F	G
1							
2		List of issued invoices			[PNL_Base Reference]		
3							
4		Customer characteristics:			[PNL_3_Selector de idioma]		
5					[PNL_3_Selector de número]		
6							
7		Registration data:			[PNL_Present Date and Time]		
8					[PNL_Start Message Creator]		
9					[PNL_3_Referencia proceso destino]		
10							
11							
12							

Preview of a document structured with Excel.

List of issued invoices	SPN-1025.1_51
Customer characteristics:	Language option 4 Option 2
Registration data:	2021-04-26 (08:21) Sarah Taylor -12.1_4

Automatic Excel document, where the process values of the fields are complete.

As explained for the Word editor, if the destination libraries of the automatic document is consulted, we will see the following:


Documents		Library	
E	Name	E	Name
	Customer risk_IM_SPN-1025.1_43.pdf		
Total: 1		No element was found Total: 0	


Library viewer "Documents", which has been used as integration destination of the generated automatic document. The "Library" viewer seems empty; however, it is the automatic document association destination.

Creating a base document in HTML

This section explains how to create and structure a base document, using some of the design features available in the HTML editor integrated in the platform. Options explained here are singular for HTML. The options in common with the creation of a base document in Word will be omitted.

From the main configuration window of the class of processes enter **Model > Base documents > Create document**, introduce the name value and mark the HTML option:


Base documents


 CREATE DOCUMENT

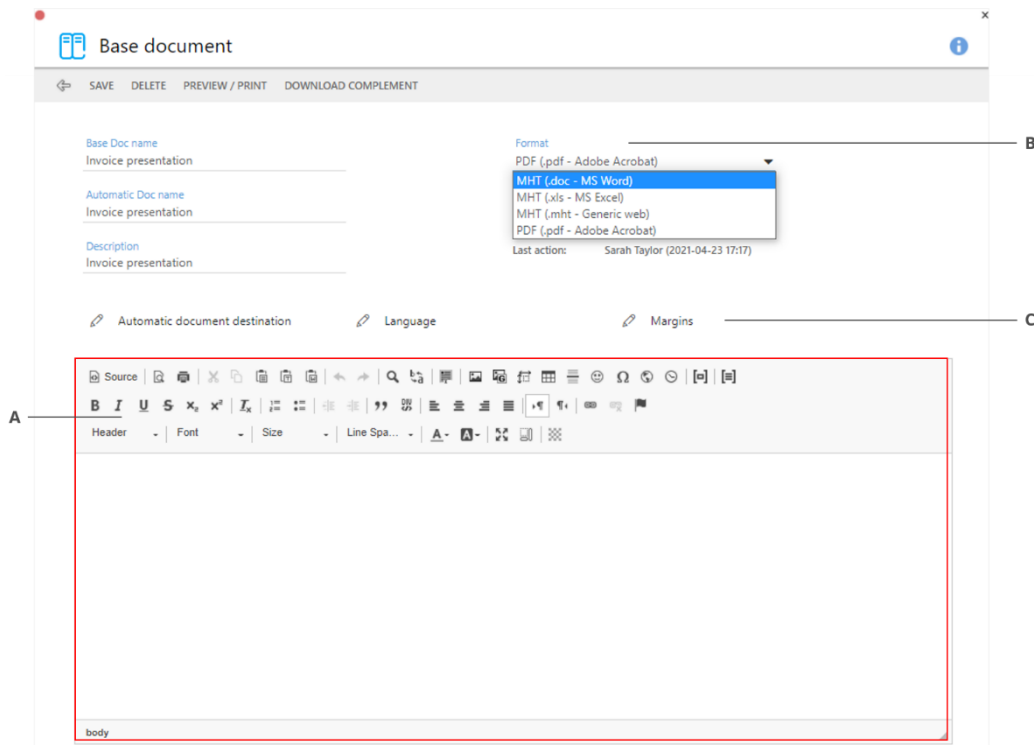
Name Proceed

Name	Description of base document	Format
Presentación de facturas	-	PDF (.pdf - Adobe Acr...
Riesgo de cliente	-	MS Excel (.xlsx)
Facturas de clientes	Muestra un listado de las facturas emitidas	MS Word (.doc)
Client Invoices	Shows a list of clien invoices	MS Word (.doc)
Customer risk	-	MS Excel (.xlsx)
Invoice presentation	Invoice presentation	PDF (.pdf - Adobe Acr...

Featured is the name of HTML the base document that has been created.

Structuring the base HTML document

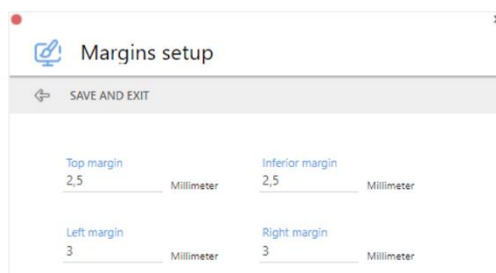
After selecting the HTML option for editing the document, the corresponding configuration window opens. In the image below, we can see that there are a series of options that must be configured, such as: destination of the automatic document, the language, margins, output format and if default data will be added to the name of the resulting file.



Editing window of the HTML-type base document, with the "Format" option selector displayed. Highlighted in red is the HTML editing area of the document content itself.

The common options between editors have been explained at the beginning of this document. Listed are the specific options:

- A. **HTML format editor.** We can select HTML commands that the system will recognize and implement.
- B. **Format.** This field is to select the output format of the automatically generated document. The options in this case are MHT (Word, Excel or Generic for web), and PDF.
- C. **Margins.** This option is to define in millimeter units the margins that the generated automatic document will present, on its four sides.

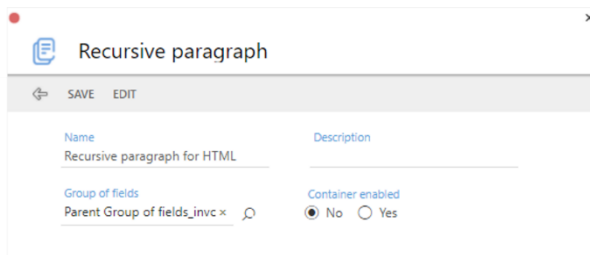


Configuration of margins for the HTML base document.

To continue with the configuration we must specify the automatic document destination of the HTML base document.

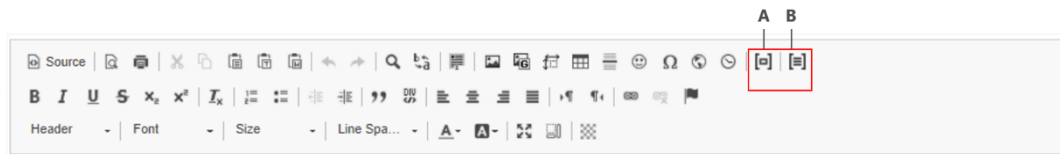


When working with the HTML editor, recursive paragraphs will be the only design characteristic of the base document that we can apply, limited to the information available in the parent group of fields. In the image below we can observe the configuration of the recursive paragraph. This configuration creates a specific notation that must be inserted in the document, in order to indicate the area where the group of fields will be displayed. It is not possible to use recursive affiliated groups of fields paragraphs when using the HTML editor



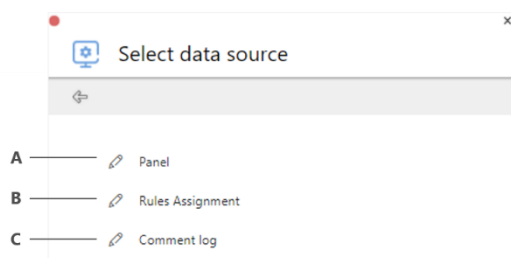
Recursive paragraph configured and available for the group of fields "Parent group of fields_invoice".

From the HTML editor, we can use the buttons provided to load components into the document:



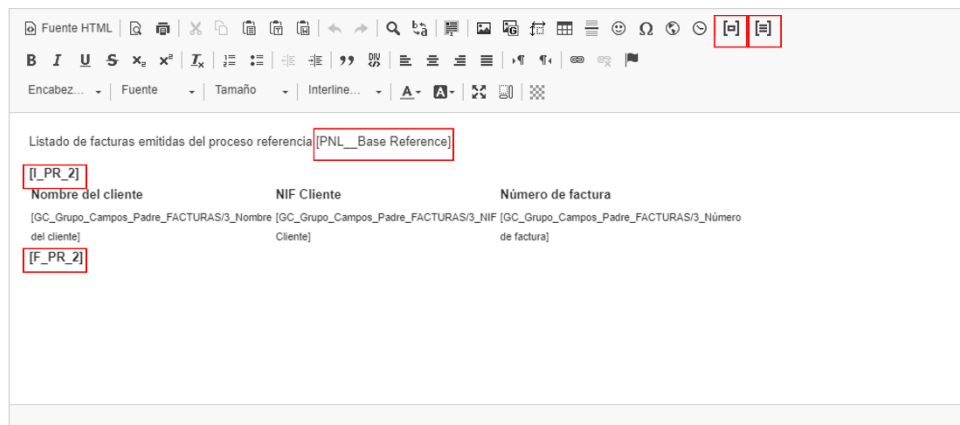
A Button to upload fields. **B** Button to upload recursive paragraphs.

The "Select data source" window, presents the following options:



- A. Panel.** This option is to add any type of panel field to the document (except groups of fields).
- B. Assignment rules.** Option that allows bringing assignment rules from the panel of the process to the document.
- C. Comment log.** Allows the loading of comment log fields in the process panel.

To upload a recursive paragraph to an HTML base document it must be previously configured in its corresponding section and uploaded to the HTML editor. Once the components have been added, as seen in the image below: a structure defined by a series of internal codes and regular text will be visible:



After the document and its creator (button in a form or system task) have been configured, we must test the results and make any necessary adjustments.

Automatic document

Base documents facilitate the creation of as many automatic documents as necessary. The number and content of documents will depend on their destination and the location of the object that generates the automatic documents.

It is important to point out that when the documents are generated by the UPLOADER system task, the behavior of the action will be similar to that of an action button in a form.

When an automatic document is generated from an action button, its origin can be:

- A form.
- A line extension of a group of fields.
- A line extension of an affiliated group of fields.

The destination of an automatic document, usually in a library type field, can be:

- A form
- A line extension of a group of fields
- A line extension of an affiliated group of fields

The user will be able to generate automatic documents with a click, if a button has been previously configured in the form's design to add automatic documents. As mentioned above the document results can vary in number and content, according to the document destination and the generating object's location. Below are the variations possible in accordance with the destination:

Destination: a singular library term, both general and suffix

Only one document is created. The document can contain general terms, prefixes, suffixes, and groups of fields. If it contains groups of fields, the document will contain all the lines of the group of fields and the lines of the lines of the affiliated group of fields, if available.

Destination: a column of a group of fields

One document will be created per each line of the group of fields. Each document can contain general terms, prefixes, suffixes, and groups of fields. If it contains groups of fields, the document will contain only the information of the line where the document is created. If the line has an affiliated

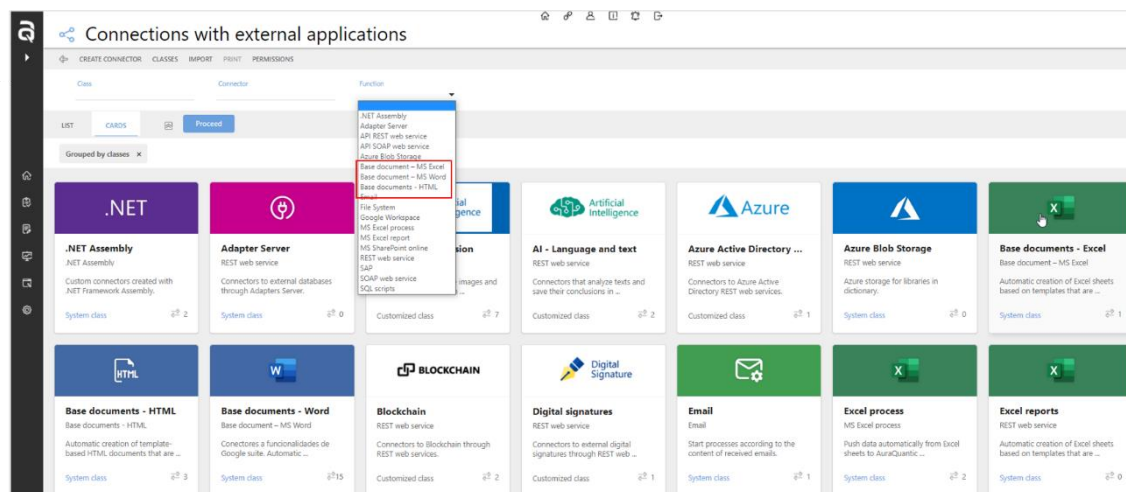
group of fields, the lines of the affiliated group of fields that correspond to the main line will also be added.

Destination: a column of an affiliated group of fields

One document will be created per each line of the affiliated group of fields. Each document can contain general terms, prefixes, suffixes, and groups of fields. If it contains groups of fields, the document will contain only the information of the line where the document is created. If the line has an affiliated group of fields, the lines of the affiliated group of fields that correspond to the main line will also be added.

Location of base documents in the platform

It is possible to access all the base documents created in the platform, regardless of their extension, by entering the "Connections with external applications" in **Structure > Dictionaries > Connectors** and selecting one of the following options from the drop-down menu of the "Function" field: "Base documents, MS Word, Base documents, MS Excel or Base documents HTML".



Once we have filtered by the desired element, we will be able to access all the elements of that class that have been created on the platform



Base documents

Structure

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