

Docmosis Template Guide

Version 3.0

Fast documents from Java!





Docmosis Template Guide

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Preface

Welcome to the *Docmosis Template Guide*. This manual is intended for document template developers who will create richly formatted document layouts with the special embedded features that enable Docmosis to produce documents using data generated by Java applications.

The *Docmosis Template Guide* provides information on developing document templates (in either MS Word, OpenOffice.org Writer or LibreOffice Writer) that will be used to produce printable documents. This guide assumes a level of competence in using each word processor and is not a reference manual for either.

OpenOffice and LibreOffice are based on the same code and can be used interchangeably by Docmosis. In this document it can be assumed that where OpenOffice is mentioned, the same applies to LibreOffice unless otherwise stated.

Note



Don't worry. If you are competent with only one of the two word processors, you don't have to know how to use the other. In general the activities to develop the templates are the same for both tools but where there are differences between the two, this document highlights them and describes the activities for each application.

Conventions used in this guide

This document uses typographical conventions that highlight significant parts of the text to distinguish it from normal text.

Text that looks like this...	Means this...
<code><<fieldname>></code>	A field in the document template. In Word it is a mail merge field. In OpenOffice / LibreOffice Writer it is an input field.
<code>docmosis.###</code>	A code instruction: either an individual line, or part of a complete module.
<code>↳</code>	A symbol to show that the line of code has wrapped due to the space restrictions on the page. You should remove this symbol from your code if you copy and paste code snippets from this document.
<code>...</code>	An indicator to signify that the preceding sequence of code instructions will execute incrementally until there is no more data in the data provider.
<code>template.doc</code>	A file name, a file extension or a Web site address.

Table 1: Typographical conventions

Additionally, some parts of the document are written specifically for one of the word processors mentioned. When this is the case, the paragraph has the respective icon in the left margin.



This icon...	Means this...
	The information applies to MS Word only.
	The information applies to OpenOffice.org Writer and LibreOffice Writer.

Table 2: Graphical conventions

Special paragraphs

In addition to the text conventions, certain information is presented in a specific way to emphasise their information.



Note

A note provides additional supporting information that will help you to understand a point that the author is trying to make.



Important

Executed code on a computer rarely cause damage to hardware but may well corrupt data. Information in this form is intended to alert you to the potential for data corruption.



Tip

A tip provides anecdotal information to support the technical information about using the system and might be useful in helping you understand the information being presented.

General Terminology

Several terms are used in this document to identify elements of a document template. The following table provides definitions for those terms. Note that the definitions are general: for more details on these terms, you should refer to the online Help for the particular word processor with which you are developing the templates.

This term...	describes this document element...
field	a placeholder that is used by Docmosis to substitute data or control document flow
boilerplate	graphical and textual content that is added to a template as reusable content to avoid having the document developer recreate the content for each document. Docmosis uses boilerplate components.
header and footer	elements of a printed document that repeat on every page. Information in these elements is usually administrative information about the document.

Table 3: Document terminology



1 Introduction

Docmosis is an easy-to-use document processor which integrates with your Java application to provide the seamless production of printable documents using data generated by the application.

The documents are produced in one or more of the following formats: MS Word; Open Office Writer; LibreOffice Writer; Adobe PDF and HTML using your custom-made templates. Docmosis delivers a great reporting engine by providing the following:

- cross platform compatibility;
- portability;
- scalability.

In this chapter, we provide information about the main features of a Docmosis template. Details for incorporating elements and Docmosis logic structures into a template are provided in Chapter 2, Developing Docmosis templates.

1.1 Separating content from presentation

Developing applications that contain presentation logic means that when an organisation's brand image changes (such as a new company logo, different corporate font or company name), so must all the applications. Using Docmosis, all of your presentational features are developed separately from your application in commonly used word processors. This has two distinct benefits:

- The initial development of the document templates can be assigned to those who are experts in that field and they can be developed using one of the two most commonly used word processors; and
- Branding changes do not require software development support, which can be time consuming and expensive.

In addition to these benefits, Docmosis is fast: the core document processor can produce hundreds of documents in minutes in the most popular formats, which is a great improvement on other document processors currently available.

1.2 What are templates?

As far as Docmosis is concerned, templates are typical MS Word or OpenOffice.org Writer documents that may also contain fields. Docmosis uses fields to insert data, and mark the start and end of content for exclusion or repetition. Fields are standard features of these two document tools meaning Docmosis does not require any custom plugins. Docmosis supports a wide range of versions (MS Word 97 onwards, OpenOffice.org Writer 2.2 onwards).

As well as using fields to drive Docmosis, templates in MS Word and OpenOffice.org/LibreOffice Writer give ideal control over aspects such as:

- page size, margins, and columns;
- information in running headers and footers;
- typographic characteristics that describe paragraph and character styles; and
- boilerplate text, graphics and embedded field codes.

Documents created using a template inherit this pattern when they are created and no programmatic effort at all is required to benefit from these features. Once the document is rendered, it has no connection to the template from which it came other than that it is based on its characteristics. Templates can be modified as required without any concern to the documents that have been rendered in the past.



Tip

In addition, as the paragraph and character patterns for the output are described in simple formatting terms, there is no real need to develop paragraph and character styles. However, if you are comfortable using styles, it might be advantageous to implement them for future template updates.

1.3 Where are the templates stored?

You can provide your templates to Docmosis in many different ways: from directories, files or Jar files (or if you are a developer, from any `InputStream`). Docmosis manages a “store” of its own templates, which acts as a cache for the templates. The cache enables Docmosis to analyse the template and to optimise it for later rendering. For more information about registering templates, refer to the *Docmosis Developer's Reference*.

1.4 How does document generation work?

In the simplest terms, Docmosis seamlessly integrates the data available in the application with the element structures in the template to produce documents that may be:

- stored electronically, printed, viewed or any combination of these; and
- published in several document formats.

During document generation, Docmosis loads the template from the template store, merges it with data and creates the resulting document in the desired format(s). Data can be sourced from any combination of locations (databases, files, Java Objects etc), templates can include/exclude any content, tables can grow and shrink and images can be embedded. These features are discussed later in this guide.

If the template document includes an index or table of contents, Docmosis will automatically update these tables in the resulting document.



1.5 Template features

Modern word processors enable the development of documents with support for high-quality typesetting and layouts incorporating inline images. By inheriting these features automatically, Docmosis provides the developer and template author with an extremely powerful automatic document generation capability. Other aspects of the document that are relevant to Docmosis are detailed in this section.

In this section:

- **General features.** Information about the general document features that can be used to create and exploit to deliver high-quality layouts;
- **Advanced features.** Details on the Docmosis features that can be incorporated into your template; and
- **Docmosis elements.** Details of the Docmosis elements that interact with the document generation process.

1.5.1 General features

Many of the integration aspects are achieved simply by using well known documentation techniques. Docmosis understands elements such as lists and tables, so there is no need to learn new techniques to develop templates for use with Docmosis.

The general aspects of a document template include the creation of branding features, layout features and static text elements. In order to create a document template for use with Docmosis, the template author can simply create a document and direct Docmosis using the following features in your word processor:

Word Feature	Writer Feature	Controls
Plain text markup	Plain text markup	Data insertion and document flow
Mail merge fields	Input fields	Data insertion and document flow
Bookmarks	Image properties	Image insertion

1.5.2 Advanced features

To generate sophisticated documents of value to your application, fields are interpreted by Docmosis. These fields can direct Docmosis providing:

- Insertion of text or image data into the body, headers and footers and tables;
- Inclusion or exclusion of static or dynamic content;
- Hyperlink Insertion;
- Repeating of content;
- Table row repetition or exclusion;
- Table column removal;

- Numbered and bullet list expansion;
- Template merging

1.5.3 Docmosis elements

All Docmosis “elements” are controlled by fields, except for image insertion which is controlled by bookmarks or image properties. Each element is discussed in detail in this guide. In general, elements may be singular (such as a text insertion) or may be paired having a start and end marker.

1.5.3.1 Field Reference

The following table provides a quick reference to the elements and their syntax. The names of the fields must match exactly for the document generation to succeed.

Element	Description	Closing Element
«name»	Replace this field by whatever data is referenced by “name”.	
«link_name»	Insert a hyperlink at this location, looking up the URL from the data under the key “name”.	
«\$abc=name»	Lookup the data associated with “name” and assign it to the variable “abc”.	
«\$abc»	Lookup the variable “abc” and render its value	
«cs_name» «cs_{expr}» «cs_\$abc»	All content up to the closing element is included or excluded depending on the value associated with “name” or the expression “expr” or the variable “abc”.	«es_name» «es_{expr}» «es_\$abc» «es_»
«rs_name» «rs_\$abc»	All content up to the closing element is repeated whilst there is data associated with “name” or the variable “abc”	«es_name» «es_\$abc» «es_»
«cr_name» «cr_{expr}» «cr_\$abc»	Include the following table rows depending on the value associated with “name” or expression “expr” or the variable “abc”.	«er_name» «er_{expr}» «er_\$abc» «er_»
«rr_name» «rr_\$abc»	Repeat the following table rows whilst there is data associated with “name” or the variable “abc”.	«er_name» «er_\$abc» «er_»
«cc_name» «cc_{expr}» «cc_\$abc»	Include or exclude the table column containing this field depending on the value associated with “name” or the expression “expr” or the variable “abc”.	
Image bookmarked with label or named “img_name” (deprecated “bm_name”)	Replace the image with the image data associated with “name” using the default scaling settings (which is stretch). The default setting can be changed by setting the docmosis property <code>docmosis.analyzer.image.scaling.default</code> to <code>fit</code> or <code>stretch</code> . See the Docmosis Developer's Reference for information about setting properties.	



Element	Description	Closing Element
Image bookmarked with label or named "imgstretch_name"	Replace the image with the image data associated with "name" and stretch the image to match the template image placeholder.	
Image bookmarked with label or named "imgfit_name"	Replace the image with the image data associated with "name" and fit the image into the template image placeholder whilst preserving the image aspect ratio.	
<<ref:sub1.doc>>	Insert the template sub1.doc at this location.	
<<refLookup:sub1>>	Lookup sub1 in the data to get the name of the template to insert at this location.	

Table 4: Docmosis element quick reference



Note

Care must be taken with all fields when using MS Word documents as templates. You MUST AVOID SPACES in a field name as a space will truncate the field and sometimes Docmosis will not be able to detect this. The good news is that most of the time this will turn up as an obvious error reported during document generation.

1.5.3.2 Expressions

The following table shows the valid expressions that Docmosis supports. The examples are for a conditional section ("cs_") but apply to conditional columns also.

Element	Description
<<cs_{a<10}>>	Lookup data element "a" and see if it is less than 10 numerically. If "a" is not numeric, a string comparison is performed automatically.
<<cs_{a='fred'}>>	Lookup data element "a" and see if it is equal to the String literal "fred".
<<cs_{\$a!=10}>>	Lookup the variable "a" and see if it is not equal to the numeric value 10. If variable "a" does not resolve to a numeric value, a String comparison is performed.
<<cs_{!hasElements()}>>	Lookup the data element "hasElements()" and boolean negate the result. If hasElements() returns something other than a boolean, the result will be evaluated using a best effort (eg a String value of "true" would resolve to true). Note that the use of the brackets "()" typically implies the data is to be sourced by calling a Java function literally.
Other operators include <=> >=>	Less than or equal to Greater than or equal to

1.5.3.3 Nesting

Elements can be "nested" with regards to the way they lookup data. For example, <<hotel.floor>> typically would refer to the floor within a hotel object. The period "." character represents the delimiter between one level of data and the next. This is described in detail later.

1.5.3.4 Range Specifiers

Data elements can also be referenced by **ranges** of values Docmosis should lookup. This provides a fair amount of power within the template to select the values of interest. It depends on the context of the element as to whether it is allowed to produce multiple values (and Docmosis will flag errors where inappropriate use is made). For example, a repeating section is expected to produce multiple values, but a simple lookup field is not.

The following table details the types of range specifier available.

Element	Description
«hotel[0]»	The first hotel (indexing starts at zero)
«hotel[F]»	The first hotel (equivalent to index zero)
«hotel[L]»	The last hotel
«hotel[*]»	All hotels
«hotel[F3]»	The first 3 hotels
«hotel[L3]»	The Last 3 hotels
«hotel[1,2,4]»	The hotels at indexes 1,2 and 4
«hotel[1-3,L2]»	The hotels at indexes 1 to 3 inclusive and the last 2
«hotel[0-L2]»	All but the last 2 hotels
«hotel[3].floor[L].room[0].name»	The name of the first room of the last floor of the hotel at index 3

1.5.3.5 Built-In Variables

Docmosis provides some built-in variables to assist with common data lookup requirements.

Variable	Description
«\$top» or «\$root»	The root of the data regardless of the current position or context in the template
«\$this» or «\$current»	The current source of data in the current position in the template. This allows for anonymous data lookups from arrays or collections such as «\$current[0]».
«\$parent»	The parent or container of data in the current context of the template. Allows data lookup in the current "hotel" when the current context is a "floor" for example.
«\$idx»	The current index into any repeating data set. For example, if we are repeating over all hotels, \$idx would report the index of the hotel we are up to.
«\$itemnum»	Similar to \$idx but is the number of the item which we are currently addressing. Item numbering starts at 1.
«\$size»	The size of the current repeating data set. For example if we are repeating over all hotels, \$size would be the number of hotels.

1.5.3.6 Error Handling

Docmosis offers two ways to deal with errors encountered in templates during processing:

1. write the error INTO the resulting document - errors are highlighted and footnotes are added to offer details and suggestions as appropriate



2. throw an exception and abort document production

This behaviour is property controlled since it is expected to be related to the type of environment in which Docmosis is running. The default behaviour is write errors into the document, but this is not always advisable. See the Docmosis Developer's Reference for more information.



2 Developing Docmosis templates

The basic steps for developing a template are:

1. create the layout, boilerplate content and typesetting characteristics of a document;
2. incorporate the Docmosis elements (fields).

The boilerplate content can include sophisticated structures using headings, lists, tables, images, and headers and footers.

**Tip**

When creating a template, use the word processor of your choice from the two identified.

This chapter provides instructions for the inclusion of the supported fields; it is divided into sections that discuss the basic aspects through to some advanced techniques. In general, the information does not cover typesetting of documents but does provide information where necessary. Most of the information in this chapter is relevant to both word processors: where they differ, information is provided for each case.

**Important**

All the procedures in this chapter assume that you understand the techniques required for the particular word processor and that you have a document open in the word processor on which you can perform the procedure.

In addition, the procedures use menu-based instructions for consistency.

2.1 Incorporating Docmosis elements

You can add Docmosis "fields" at any location in a document template. Each field must have an appropriate property name that identifies it and associates it with an element of the data generated by Docmosis. During document generation, Docmosis expects the application to provide values and logical data structures with the same names and structure as the elements that exist in the template.

Docmosis supports fields using:

- plain text mark-up
- Merge Fields in MS Word
- Input Fields in Open Office Writer or Libre Office Writer

Plain text mark-up is the simplest to use since there are no dialogs to interact with and what you see is what you get. With both Word and Writer, a field (Merge Field or Input Field) can have a different value displayed to what it represents "behind the scenes".



2.2 Using Plain Text Mark-Up

Plain text mark-up is the easiest method of creating fields in Docmosis templates. By default, the start of a field is annotated by << and the end of a field by >>. So to create a field that looks up "personName", you would simply type <<personName>> into the document.

So as to be as unobtrusive as possible to the text of a template, Docmosis is strict about identifying plain text fields and will ignore invalid mark-up assuming it is plain text. For example, <<personName> will be ignored and left as plain text because a closing ">" character is missing. Likewise, a space between the << and the name or the name and >> will mean the field is not recognised. The following table shows the typical types of error that will result in a field not being recognised.

Example Field	Valid	Problem
<<personName>>	<<personName>>	Correct field. Docmosis will identify and substitute.
<<personName>	<<personName>	Missing trailing >
<personName>>	<personName>>	Missing leading <
<< personName>>	<< personName>>	Space after leading <<
<<personName >>	<<personName >>	Space before trailing >>
< <personName>>	< <personName>>	Space after leading <
<<personName> >	<<personName> >	Space before trailing >

Plain text mark-up is controlled by the properties:

Property	Default	Description
docmosis.analyzer.field.plainText.prefix	<<	Start of field delimiter
docmosis.analyzer.field.plainText.suffix	>>	End of field delimiter

The plain text mark-up settings can be changed or disabled on a case by case basis using features of the DocumentProcessor class. For more information about setting Docmosis properties, please see the Docmosis Developer's Reference.

2.3 Using Document Fields As Mark-Up

Docmosis also supports the use of the "document fields" supplied by the Word and Writer word processors such as *merge* fields and *input* fields.

The **advantages** of using these document fields include:

1. you can display text that is different from the actual field codes for docmosis. For example the following field appears as:
«friends»
but may in fact represent:
«friends[0].lookupName»
so it appears smaller or more succinct in the document.

2. a logical separation of content and control/mark-up. It is clear to both users and the Docmosis engine what is plain content and what is Docmosis mark-up.

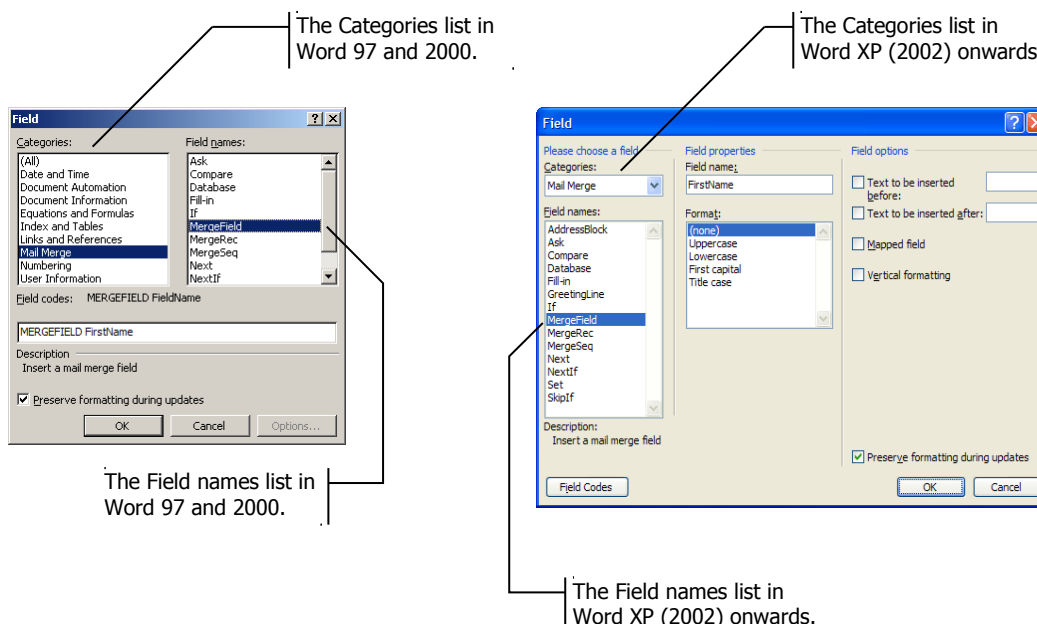
The **disadvantages** of using document fields include:

3. a field can be confusing or misleading because it's true lookup value is hidden
4. more effort is required to work with these fields via popup dialogs or switching field codes on and off
5. with Word merge fields the "display" value can be accidentally lost (replaced with the underlying lookup value) if the fields in the document are "updated"
6. the latest versions of Word make it difficult to simply insert a merge field, trying to guide the user to link up to a data source. The options are to user plain text fields, type the field codes manually, or copy a merge field from another document then edit it to what you require.

The following sections describe how to insert document fields using the features of Word and Writer.

2.3.1 About MS Word versions

In general, the procedures to implement the Docmosis features into templates are consistent in all versions of MS Word. However, the layout of the *Field* dialog box has changed over the years. The following illustrations show the dialog box layouts for the different versions and identifies the areas that are relevant to Docmosis templates.



The Field dialog box layouts in different versions of MS Word

Newer versions of Word (from 2007) make it difficult to insert a merge field manually. Your options include:

1. use plain text mark-up instead of document fields



2. copy a merge-field from another document then edit it
3. turn field-codes on and manually construct a field. Please refer to Word's help for details about manually entering field codes.

2.3.2 To Insert A Field Using MS Word

This section describes how to insert a document field. It is generally simpler to use plain text mark-up as described in section 2.2 Using Plain Text Mark-Up.

To insert a field that will look up a value for "firstName":



For versions prior to Word 2007:

1. Position the insertion point at the location for the field.
2. Select **Insert > Field**.
3. In the *Field* dialog box, select Mail Merge from the **Categories** list.
4. Select MergeField from the Field names list.
5. Type `firstName` into the appropriate field (see About MS Word versions earlier).
6. Click **OK**.



Tip

By default, MS Word displays the same text in the merge field as the title you enter in the *Field* dialog box. You may change the text that is displayed without changing the title of the merge field. Simply edit the text that appears between the angle brackets. Be warned though that this is generally not a good idea because if anyone updates the field codes in the document, the "display" name will be reverted back to the real contents.



Tip

In MS Word documents it is a good idea to frequently ensure the merge fields are displaying what they actually are going to look up. This can be achieved by selecting the fields (or the whole document) and pressing F9 (update field codes).

For versions from Word 2007:

1. Copy the field from another document and then edit

The reasons for the above limitation are described in 2.3.1 About MS Word versions.

2.3.3 To Insert A Field Using Open Office / Libre Office Writer



This section describes how to insert a document field. It is generally simpler to use plain text mark-up as described in section 2.2 Using Plain Text Mark-Up.

To insert a field that will look up a value for "firstName":

1. Position the insertion point at the location for the field.
2. Select **Insert > Fields > Other**.
3. In the *Fields* dialog box, select the **Functions** tab.
4. Select Input Field from the **Type** list.
5. Type `firstName` into the **Reference** field.
6. Click **Insert**.
7. When the *Input Fields* dialog box prompts you, in the field below the one that contains the field reference, type the text that you want to be displayed in the document to identify the field. Keeping this text consistent with the text in the Reference is a good idea since it can avoid mix-ups.



Note

OpenOffice.org Writer presents the field information differently from MS Word: OpenOffice.org Writer does not insert a pair of angled brackets («...») around the displayed field text. You can hover your mouse cursor over the field to see the "real" value that will be used by Docmosis to lookup the data. Another easy way to access the "real" value is to right click on the field and select "Fields".

8. Click **OK**.
9. To close the *Input Fields* dialog box, click **Close**.



Note

When inserting fields in OpenOffice Writer you may choose to leave the field dialog open whilst you work and whenever you need to add a field, you simply go to the dialog and start adding it. Also, note that ctrl-F2 is a shortcut to the Fields dialog.

2.4 Basic text elements

Docmosis supports the inclusion of elements that simply match an element of data that is output by the application (essentially, this is a one-to-one match). Wherever an element occurs, Docmosis will substitute the actual data value in the document. The inserted data inherits all the typesetting characteristics that are applied to the field such as font and paragraph style. The syntax for a text field is:

«element-name»

To populate the template element, the Docmosis engine would attempt to source data by the name of the element. A field designed to look up data for "firstName" would appear in different ways depending on how you create the field:

Field	Appearance
Plain Text Field	<<firstName>>
Word Merge Field	«firstName»
Writer Input Field	firstName



Docmosis will replace the field with all the text supplied as if you had selected and typed over the field by hand. If the lookup data contains new-line characters, Docmosis will create new paragraphs in the resulting document. If there is no lookup data for the name, the field is removed.

2.5 Images

Docmosis is able to insert images at arbitrary locations in documents. Instead of using fields to identify the location for an image substitution, Docmosis uses the word processor's image handling features. By handling images this way, the template can precisely define how the image will be placed and bordered within the resulting document. As each word processor works slightly differently, there are specific methods for setting up the Docmosis code element:

- In MS Word Docmosis uses the bookmarks feature to identify a name for an image; and
- OpenOffice.org Writer supports the identification of images directly, using a *Name* property.

Docmosis Example Template

Staff Profiles

Please contact any of our friendly and experienced staff for more information about your system solution.

«rs_IDSets»

Name: «name»
Position: «position»
Tel: «telephone»
Email: «email»

Summary:
«profileSummary»

«es_IDSets»



In MS Word, bookmarks identify images.

Images can be placed anywhere in a Docmosis template.



Note

In the preceding example, a borderless table is used for layout purposes.



Tip

This activity doesn't discuss the actual images that you will publish, only the placeholder image. You may create and use your own image but for your convenience, a placeholder image is provided as part of the Docmosis distribution.

You are free to use it without restriction.



Use only inline images in MS Word

Docmosis cannot support floating images in MS Word because it uses the bookmarks feature to assign a name an image placeholder. When you position an image using the floating position settings, MS Word removes the bookmark. There are other limitations to how Docmosis supports images, particularly in terms of overlapping with text and other images. This generally will not cause issues for typical documents.

Image file size

When you insert a placeholder image, you will embed the image in the document. This means there is a copy of the image at every location in which it is placed (not simply a single, referenced copy). To limit the overall size of the template file and to improve the performance of a document generation, you should use relatively simple and small placeholder images to identify the locations without compromising on print-quality if the document is to be printed.

Image placeholder naming convention

Image placeholder names are identified using special prefixes. These prefixes are a useful way to distinguish those items that are specific to your Docmosis application and enable you to use the bookmarking and naming features for other items that aren't part of a document generation.

The prefixes you can use are:

Prefix	Example	Effect
img_	img_image1	The image is substituted with the supplied <i>image1</i> and default scaling is applied. The default scaling is "stretch" and may be changed by Docmosis properties or by parameters when rendering the document.
imgstretch_	imgstretch_image1	The image is substituted with the supplied <i>image1</i> and stretch scaling is always applied. The image is stretched to be the same size and shape as the place holder image in the template.
imgfit_	imgfit_image1	The image is substituted with the supplied <i>image1</i> and the image will be scaled to fit the template placeholder whilst preserving image1's aspect ratio.



Note

Docmosis previously used "bm_" instead of "img_". The "bm_" prefix is still valid and is synonymous with "img_" but its use is deprecated and future versions of Docmosis may remove support for it.

In the following procedures, an image is inserted as a place holder in the template to be substituted for image data identified by "image1".



To insert an image element (MS Word):

1. Position the insertion point at the location of the image.
2. Select **Insert > Picture > From File**.



3. In the *Insert Picture* dialog box, navigate to the location of the placeholder image and select it in the list of files.
4. Click **Insert**.
5. When the image appears in the document, select it and use the reshaping handles to adjust the dimensions of the image.
6. Make sure that the image is selected and click **Insert > Bookmark**.
7. In the *Bookmark* dialog box, type `img_image1` into the **Bookmark name** field.
8. Click **Add**.

**Tip**

MS Word wraps the content of the bookmark in light-coloured square brackets. To see the bookmark in place, set the **Bookmarks** option in the MS Word *Options* dialog box.

**To insert an image element (OpenOffice.org Writer):**

1. Position the insertion point at the location of the image.
2. Select **Insert > Picture > From File**.
3. In the *Insert picture* dialog box, navigate to the location of the placeholder image and select it in the list of files.
4. Click **Open**.
5. When the image appears in the document, select it and use the reshaping handles to adjust the dimensions of the image.
6. Make sure that the image is selected and click **Format > Picture**.
7. In the *Picture* dialog box, select the **Options** tab.
8. Type `img_image1` into the **Name** field.
9. Click **OK**.

Both bookmark names and image names must be unique in your template since both Word and Writer force the name to be unique. If you wish to reference the same image in your template multiple times, you will have to provide different names by which the image can be referenced.

2.6 Active Hyperlinks

Docmosis allows you to insert a hyperlink dynamically into your document. In your template, a particular naming convention identifies fields you would like to work as hyperlinks.

To create a hyperlink, insert a field starting with "`link_`". For example, the following field:

`<link_myWebSpace>`

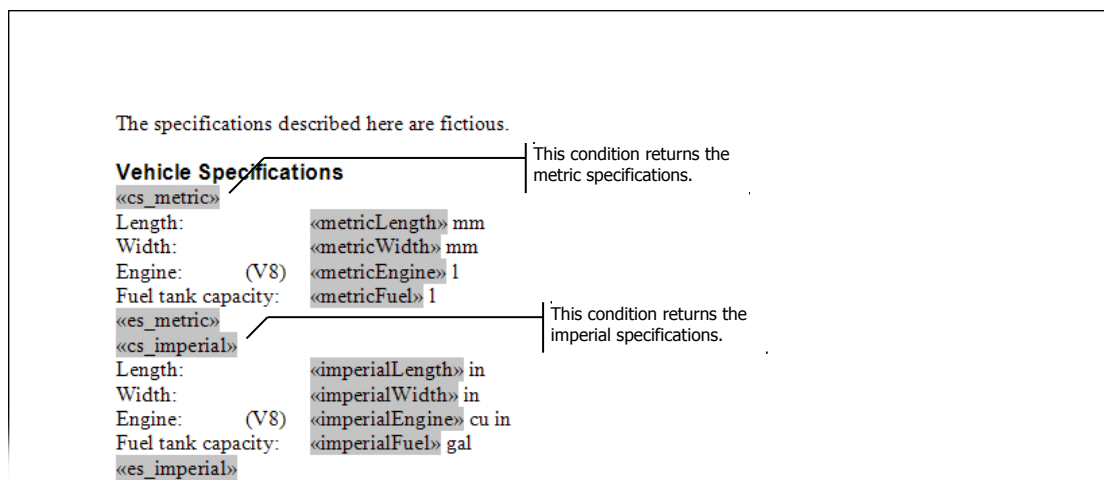
will act as a hyperlink looking up data for `myWebSpace` in your data. If your data has a value `http://www.docmosis.com` for `myWebSpace`, then a hyperlink to `http://www.docmosis.com` will appear in your rendered document.

You may also wish to make the displayed text for your hyperlink different from the actual URL of the link. Using the above example, to display *DOCMOSIS* instead of `http://www.docmosis.com` for the link in the final document, the data can provide a value `DOCMOSIS|http://www.docmosis.com`. The pipe (`|`) symbol separates the display name from the actual link.

2.7 Conditional sections

Conditional content is content that will be populated in the final document depending upon the data that is generated by the application. If the specified condition is met, the content within the matching conditional section is rendered in the document.

An example of the application of conditional content might be in a product description such as that for a motor vehicle in the following illustration.



An example of conditional sections in a Docmosis template.

The conditional sections will render the data that is appropriate for each condition. That is, each document will be generated with either metric or imperial specifications but not both. Each conditional section is defined using a pair of fields: a start field and an end field. The general syntax for a conditional section is:

`<<cs_ condition-name>>`

The text and elements of the conditional section.

`<<es_ condition-name>>` or simply `<<es_ >>`

Conditional sections can use expressions, variables and range specifiers. See the tables in 1.5.3 Docmosis elements for more information.



The conditional start and end tags are removed from the resulting document and if each tag is on a line by itself, the entire line will be removed.

To create a conditional section:

1. Position the insertion point in an empty paragraph at the starting location of the conditional section.
2. Insert the opening condition element into the empty paragraph.
3. Add the boilerplate content and other Docmosis elements into the subsequent paragraphs in the document.
4. Insert the closing condition element into an empty paragraph following the conditional content.
5. Repeat steps 1 through 4 for as many conditions as there are in your application.

2.8 Repeating sections

In a document, a repeating section is a group of elements in succession whose content changes but whose format is the same. Docmosis supports several forms of repeating sections: block-level, tables and lists.

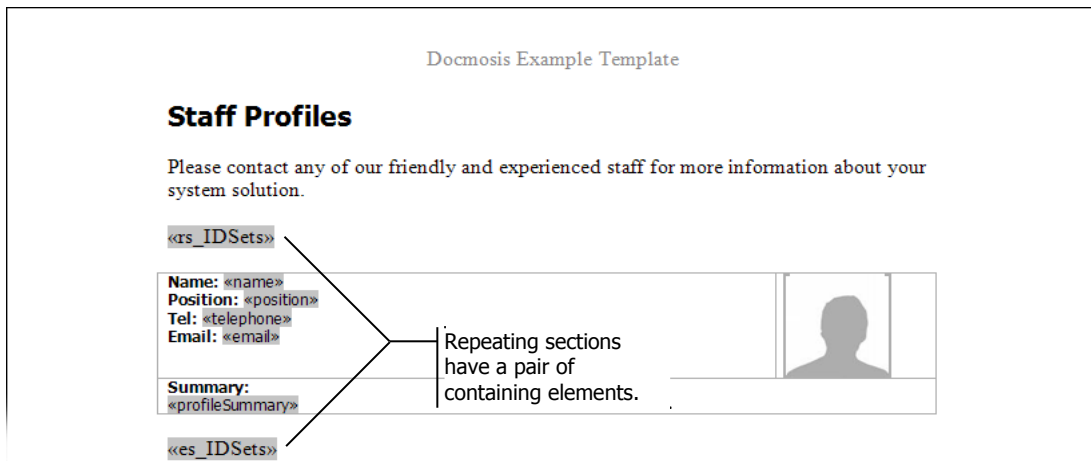


Note

Tables and lists are special forms of repeating sections. They are discussed after this section that deals specifically with block-level repeating sections.

There might be occasions when you want to include repeating sections but do not want to use tables and lists (bulleted or numbered) to present them. In this case you use the Docmosis repeating section elements. Repeating sections can contain any content desired, and it will be repeated whilst there is data to be displayed.

The example below shows a repeating section named `IDSets`, and it contains a table with an image and textual data. This table will be repeated as many times as there is data associated with `IDSets`.



Repeating sections also contain boilerplate content and other Docmosis elements.

The general syntax for a repeating section is:

«rs_repeating-section-name»

The text and elements of the repeating section.

«es_repeating-section-name» or simply «es_ »

Repeating sections can be “nested” inside other repeating sections to any depth desired. Repeating sections can use variables and range specifiers as appropriate. See the tables in 1.5.3 Docmosis elements for more information.

The repeating start and end tags are removed from the resulting document and if each tag is on a line by itself, the entire line will be removed.

To create a repeating section:

1. Position the insertion point in an empty paragraph at the starting location of the repeating section.
2. Insert the opening repeating section element into the empty paragraph.
3. Add the boilerplate content and other Docmosis elements into the subsequent paragraphs in the document.
4. Insert the closing element into an empty paragraph following the repeated content.

2.9 Tables

Using fairly simple table markup, you can create sophisticated table layouts in your output documents. In addition to being able to insert text and images using the methods already described, you can use the table-specific Docmosis elements to control:

- including or excluding of groups of rows;
- repeating groups of rows;
- removing columns.

2.9.1 Conditional rows

A set of consecutive rows can be removed from a table using conditional row elements. The following example uses the «cr_hasFriends» and «er_hasFriends» elements to indicate a group of rows in a table that should be excluded if there are no friends.

Docmosis Example Template

Circle of Friends	
«cr_hasFriends»	
Jimmy has some friends	
«er_hasFriends»	

In this case, if the data indicates that hasFriends is true then the row containing "Jimmy has some friends" would be left in the resulting document, otherwise it would be removed. In all cases, the rows containing the markers «cr_hasFriends» and «er_hasFriends» will be removed:

Docmosis Example Template

Circle of Friends	
Jimmy has some friends	



Note

End markers for conditional rows can also be defined without the name. In the above example, the field «er_hasFriends» could also be simplified to «er_».

2.9.2 Repeating rows

Rows of a table can be repeated whilst there is data to repeat. The following example will list of all the friends of Jimmy using one row for each friend showing their name in one column and job in another.

The following example uses the «rr_friends» and «er_friends» elements to indicate a group of rows in a table that should be excluded if there are no friends.

Docmosis Example Template

Circle of Friends	
Friend	Job
«rr_friends»	
Jimmy has a friend called «friend»	«friendJob»
«er_friends»	

In this case, while the data can supply information for friends the row containing the lookup friend information will be rendered. In all cases, the rows containing the markers «rr_friends» and «er_friends» will be removed.

Docmosis Example Template

Circle of Friends	
Friend	Job
Jimmy has a friend called Dave	Marketing Manager
Jimmy has a friend called Dee	C++ Developer
Jimmy has a friend called Pete	Roof Tiler

The template for repeating rows also provides some tricks for colouring and borders that can produce impressive results. The rules are as follows:

1. if a cell of a row inside a set of repeating rows has a background colour different to that of the corresponding cell of the starting row (the row with the «rr_xxx» element), then the background colour for that cell will alternate between that of the starter row and it's own background colour. This allows everything from plain tables, to alternating rows to crazy alternating patterns.
2. the starting row (the row with the «rr_xxx» element) determines the top border of the first repeating row. The ending row (the row with the «er_xxx» element) determines the bottom border of the last row to be rendered. This applies on a cell-by-cell basis as for the background colouring. This allows for highly configurable borders to be specified that work pretty much as one would expect.



The following example creates a bounding border encapsulating all the repeating rows (including the marker rows, and alternates the background colour.

Docmosis Example Template

Circle of Friends	
Friend	Job
«rr_friends»	
Jimmy has a friend called «friend»	«friendJob»
«er_friends»	

Notice in the result below the alternating background colours and the border wraps all cells collectively.

Docmosis Example Template

Circle of Friends	
Friend	Job
Jimmy has a friend called Dave	Marketing Manager
Jimmy has a friend called Dee	C++ Developer
Jimmy has a friend called Pete	Roof Tiler



Note

End markers for repeating rows can also be defined without the name. In the above example, the field «er_friends» could also be simplified to «er_».

More advanced examples are given in section 2.9.4.

2.9.3 Conditional columns

A template may also indicate columns in a table that are to be conditionally removed. The width of the table remains as fixed in the template and the space recovered by the removal of the column is spread across the remaining columns. The following example shows a Docmosis conditional column element («cc_showJobs») at the top of the second column.

Docmosis Example Template

Circle of Friends	«cc_showJobs»	
Friend	Job	Contact
«rr_friends»		
Jimmy has a friend called «friend»	«friendJob»	«friendContact»
«er_friends»		

When rendered, this removes the column entirely where the data indicates that showJobs is false.

Docmosis Example Template

Circle of Friends	
Friend	Contact
Jimmy has a friend called Dave	After hours
Jimmy has a friend called Dee	Any time
Jimmy has a friend called Pete	Any time

The following example uses *expressions* to conditionally remove two columns from the table. If you examine the Trial 2 and Trial 3 columns, you will see the conditional column expressions in fields «cc_{ntrials>1}» and «cc_{ntrials>2}».

Lab Results	Trial 1	Trial 2 «cc_{ntrials>1}»	Trial 3 «cc_{ntrials>2}»	All Passed
«rr_specimens»				
«name»	«results1»	«results2»	«results3»	«passed»
«er_»				

If the underlying data says there is only one trial for example, that is, ntrials = 1 then the conditions for the Trial 2 and Trial 3 columns will evaluate to false and the columns will be excluded. This is shown in the following example output:



Lab Results	Trial 1	All Passed
SP1A-2474	47.241	No
SP1A-2524	23.442	Yes
SP1A-3211	13.672	No
SP1A-3213	53.342	No

If the underlying data says there are 2 trials, that is, ntrials = 2, then the Trial 2 column will remain in the resulting document, but the Trial 3 column is still removed:

Lab Results	Trial 1	Trial 2	All Passed
SP1A-2474	47.241	32.553	No
SP1A-2524	23.442	44.123	Yes
SP1A-3211	13.672	61.153	No
SP1A-3213	53.342	12.223	No

2.9.4 Advanced table structures

Docmosis supports the nesting of repeating and conditional content in table structures. The following example template shows multiple levels of repeating to print out the room details within each floor within each hotel.

<<tr_hotels>>		
Hotel <<hotel>>	Location <<location>>	
<<tr_floors>>		
Floor <<floor>>		
Room #	# Beds	Other Features
<<tr_rooms>>		
<<roomNo>>	<<nBeds>>	• <<roomFeature>>
<<tr_rooms>>		
<<tr_floorRow>>		
<<tr_hotelRow>>		
Footer		

The example above is fairly extreme and it would often be more natural to represent the structure in a combination of repeating sections and tables with repeating rows. The following template is equivalent but is not providing the entire structure within a single table:


```

«rs_hotels»
Hotel «hotel» in «location»
«rs_floors»
Foot: «floor»


| Room #     | # Beds  | Other Features  |
|------------|---------|-----------------|
| «r_rooms»  | «nBeds» | • «roomFeature» |
| «er_rooms» |         |                 |


«es_floors»
«es_hotels»

```

2.10 Lists

Docmosis infers repetition when there are one or more elements in paragraphs formatted as a list using the 'bullets and numbering' features. As long as the data provider has data to populate, the list will be rendered with items.

In the following example, a field is formatted as a numbered list and will be automatically expanded.

Docmosis Example Template

List Expansion Example

These are my friends:

- «friends[*].friend»

An example of a list item.

Docmosis splits the element into two parts, a repeating component and a lookup component. The repeating component can be limited by a using range specifier covering multiple values. In this example, the range specifier [*] against the friends name means for all friends and the trailing friend name is the lookup of the data to display.



Docmosis Example Template

List Expansion Example

These are my friends:

1. Dave
2. Dee
3. Pete

As another example of how the field is split, consider the following template.

Docmosis Example Template

List Expansion Example

My first friend «friends[F].friend» has the following pets:

- «friends[F].pets[*].type»

The element now is in a bullet list style rather than numbered. It has a repeating component friends[F].pets[*] meaning all pets of the first friend and a lookup component type. The resulting document is shown below where the friend has a dog and a parrot.

Docmosis Example Template

List Expansion Example

My first friend Dave has the following pets:

- dog
- parrot

Docmosis only allows a single component of the element to be a multi-valued range. For example, Docmosis would not allow an element friends[F2].pets[*] since this would repeat at multiple stages and typically would be a mistake.

To create a list:

1. Position the insertion point at the location of the first list item.
2. Format the paragraph as a list item (bulleted or numbered).
3. Add the Docmosis element that will render the data into the list paragraph.

2.11 Merging Templates Together

Docmosis has the ability to combine multiple templates into the resulting document. This gives developers and template authors the ability to separate common content out of individual templates and into a "shared" or common template. The common information then only needs to be maintained in one location and all referencing templates will automatically use the new information. Examples of use include company information including logos for the header, contractual clauses and signature blocks for the body, or even the specific content of the bottom left of the footers.

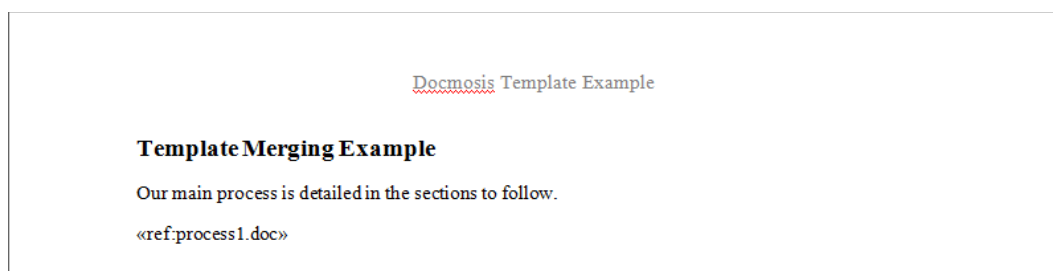
Templates used for inclusion can include all typical content including styled text, headings, tables, images etc. Docmosis will populate the templates as per normal using the data that applies at the point of insertion, as if it were content in the main template as opposed to separated out. Any number of templates can be included, and included templates may include other templates.

The way to control this is to insert a *reference* in your template to another template. The referenced template will be populated and inserted at the referenced location. For example, given a starting template `MainProcess.doc` that references two other templates `process1.doc` and `process2.doc`, Docmosis will insert `process1.doc` and `process2.doc` into `MainProcess.doc` as it processes `MainProcess.doc`.

Docmosis supports two ways of referencing templates; directly and indirectly. Each of these is explained in the following sections.

2.11.1 Direct Referencing

Direct referencing is very simple, the template to include is literally named in the reference. The way to create a direct reference is to use a merge field prefixed with "ref:". For example `<ref:process1.doc>` will cause the template `process1.doc` to be inserted. The following example shows how this would look in a template:



2.11.2 Indirect Referencing

The name of the template to include can be determined by the data, rather than by the template directly. In this scenario, Docmosis will ask the DataProvider to provide the template name.



To create an indirect reference, the field prefix "refLookup:" is used. For example, if we created a field «refLookup:process1», Docmosis will ask the DataProvider for the name of the template under the key "process1". The value the DataProvider returns will be used as the name of the template to insert into the document. If the template in the example above was changed to use an indirect reference as discussed, it would look like this:

Docmosis Template Example

Template Merging Example

Our main process is detailed in the sections to follow.

«refLookup:process1»

2.11.3 Templates in Different Locations

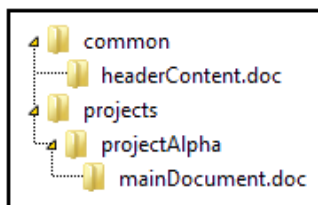
Docmosis assumes by default the templates referenced existing in the same location (that is the same template context) as the referring template. In our scenario above, process1.doc and process2.doc must exist in the same place as MainProcess.doc. This works for small scale use, but would quickly become unmanageable if there were a large number of templates in use.

For example, say the company banner information has been put into a separate template for use in all documents, it would be unfortunate to have copies of this template everywhere. Instead, there might be a single copy of the template in a common area for all projects and templates to reference. Docmosis allows the templates to be referenced in any context using the familiar path notation. Here are some example template references and what they mean.

Field	Description
«ref:template1.doc»	template1.doc is expected to be in the same location as the calling template.
«ref:/template1.doc»	template1.doc is expected to be in "root" context . The root context is the parent of all other contexts.
«ref:/common/template1.doc»	template1.doc is expected to be in the "common" context one down from the root context
«ref:../template1.doc»	template1.doc is expected to be in the parent context of the calling template.

For example, consider a project "projectAlpha" which has its own templates and is stored in the template context "projects/projectAlpha". We want to include a common heading in some of our templates, and so we separate that content into a separate template called corporateHeading.doc. We realise that corporateHeading.doc applies to lots of other projects and should not really exist inside projectAlpha itself.

We decide to create a common area to store the templates that are common to lots of projects inside the context "common". When all our templates are loaded into Docmosis, the template store will look like this:



Templates such as `mainDocument.doc` will be able to reference and include the template `headerContent.doc` using the field `<<ref:/common/headerContent.doc>>` or the field `<<ref:../common/headerContent.doc>>`. The two fields just listed use a literal "ref:" lookup of the template names; the same result can be achieved using the indirect "refLookup:" lookup if the data provider supplies the appropriate value.



Note

If you are using Word for your templates, make sure the paths or folders you are using don't contain spaces in the name. If so, the fields in the Word template will not work as desired (and Docmosis will tell you so). If you really wish to have spaces in the names of paths and folders, then you will have to use dynamic (`refLookup:`) fields rather than static (`ref:`) fields or use OpenOffice Writer for your templates.

2.11.4 When A Template Cannot Be Found

Docmosis treats a missing template as an error. During the rendering of a document, if a template reference is encountered and the template cannot be found then an error will be raised. Depending on Docmosis configuration this will either write the error into the resulting document, or produce no document at all and raise a Java Exception (see section 1.5.3.6 Error Handling).

A template *could* make reference to a template that doesn't exist and still be functional if the processing of that template does not try to render the missing reference. This could happen if the reference was in a conditional section that always gets skipped, for example.

2.11.5 Limitations

There are some practical limitations to the ability to include templates. The following sections cover the fundamental limitations.

2.11.5.1 Headers and Footers

The main (root) template defines the headers and footers that will be used throughout the produced document. Any headers and footers in the included templates will be ignored. This doesn't mean the *content* of headers and footers can't be determined by included templates, but the presence and overall properties are controlled by the main template.



2.11.5.2 Performance

The flexibility and maintainability provided by the Docmosis template merging feature has a small processing overhead at runtime. Since significantly more work needs to be done to produce the final combined document it is not surprising that there is a runtime cost. The impact will vary upon the numbers and sizes of included documents but in practice the difference in practice is not expected to be noticeable.

2.11.5.3 Styling Limitations

There are some tricks to learn about styling with regards to including templates. One example is where the included template has a Heading style for the first line. Depending on the versions of OpenOffice in use, the Heading style may get dropped unless there is a leading blank line first. This is fairly minor in practice, but something to be aware of. Most of the time the behaviour will be as expected and so experimentation will only occasionally be called-for.

2.12 Page and Other Breaks

Docmosis templates may contain several types of break including page breaks, column breaks and section breaks. If the break is in your template it will appear in your rendered documents unless you condition it out with a conditional section. If the break is inside a repeating section it will be repeated each time your repeating section is displayed.

To allow templates to be more expressive, Docmosis provides several fields that can be used to render a break, but without having to place the break literally into the template:

Field	Description
<code><<pageBreak>></code>	Insert a page break at this location in the document.
<code><<columnBreak>></code>	Insert a column break at this location in the document. This only applies to templates that have a multi-column page layout.
<code><<pageBreakNotLast>></code>	Insert a page break at this location in the document unless we have finished repeating the current repeating section. This is only valid within a repeating section.
<code><<columnBreakNotLast>></code>	Insert a column break at this location in the document unless we have finished repeating the current repeating section. This is only valid within a repeating section and within a page layout that is multi-column.

For example, a template section repeating person details and desiring to put each person on a separate page could look like this:



Docmosis Example Template

```
<<rs_people>  
First Name: <<firstName>  
Last Name: <<surname>  
<<pageBreakNotLast>  
<<es_people>
```


3 Applying a Renderer

To enhance the presentation of your documents, you can apply a “renderer” to the field. This allows various changes to be made to the field including:

- changing the background colour (if in a table cell);
- changing the font style to bold, italics or underline.
- changing the text to be displayed

To associate a renderer with a field, you use the `renderer` qualifier with the name of the renderer that is to be used. The Java code supplying the data will also be responsible for supplying the renderer (which is described in the *Docmosis Developer's Reference*). The only requirement in the template is to associate the renderer with the applicable field. For example:

```
{renderer=myrenderer}
```

The field with the renderer would look something like this:

```
«surname{renderer=myrenderer}»
```



Note

Remember, you don't need to use a `renderer` qualifier if you want a cell to be permanently shaded. Renderers allow changes based on conditions that exist during document generation.



Tip

You can set the background colour of a cell with no data by using an element whose name has no equivalent (and thus no data) in the application, or by using a field named `dummy`.



Important

To enable the qualifier to work, you must make sure that you edit the code of the field and not the display name/result.



Important

Make sure there are no spaces in the field name or qualifier. Spaces may cause the qualifier to not be recognised, particularly if using Word for the template source. If a space is required, use the underscore character (`_`).

3.1.1 Renderer Parameters

Renderers may also be passed parameters so that the same renderer can be given different directives depending on the case at hand. For example, the following fields pass different parameters to the renderer named myrenderer:

```
«surname{renderer=myrenderer('strict')}»
«surname{renderer=myrenderer('bold','relaxed')}»
```

The first sends a "strict" parameter to myrenderer, whilst the second sends "bold" and "relaxed". myrenderer is written in Java code and may respond to these parameters as it sees fit.

3.1.2 Built In Date Renderer

Docmosis has a built in date renderer which is available to all templates without requiring any Java code. To use it simply reference a renderer named "date". It will format the date in the default format (dd MMM yyyy) or as indicated by a single parameter. The parameter is in the format specified by the Java SimpleDateFormat class which is described in the Java API Specification. Some examples of suitable formats are shown below. The full documentation for SimpleDateFormat can be read on-line at <http://java.sun.com/reference/api/> and navigating into the J2SE version of your choice.

The date formatter only applies to date-typed data as comes from Java objects or database queries.

The following example uses the built in date renderer to format a birthdate field into a two-letter year format:

```
«birthdate{renderer=date('yy')}»
```

To allow for formats that include a space, the underscore character (_) is transcribed automatically into a space. This is done since fields cannot contain spaces when using Word as the template source. To include an underscore, the backslash character can be used to indicate that the underscore should be left as an underscore (_).

The table below shows some examples of date formatting:

Example Field	Result
«birthdate{renderer=date}»	27 May 2009
«birthdate{renderer=date('E_MMM_yyyy')}»	Wed May 2009
«birthdate{renderer=date('yyyy')}»	2009
«birthdate{renderer=date('dd/MM/yyyy')}»	27/05/2009



To attach a renderer to a field (MS Word):

1. Select the element in the required table cell.
2. Right-click and select **Edit Field** from the context menu (or toggle the field code in earlier versions of Word using *Shift-F9* or *Alt-F9*)



3. Add the `renderer` qualifier inside curly braces to the element name.
4. If you are using the **Edit Field** dialog Click **OK** (or toggle the field code back using *Shift-F9* or *Alt-F9*).
5. If you don't want to see the qualifier in the field result, delete it directly in the field.
6. If you have already created repeating rows or row groups in a table, repeat steps 1 through 5 for each row or group.



To attach a renderer to a field (OpenOffice.org Writer):

1. Select the element in the required table cell.



Note

Don't left-click on the field with the mouse. You won't be able to change the field code in the *Input Field* dialog box.

2. Select **Edit > Fields**. The *Fields* dialog box is displayed.



Tip

You can also right-click the field and select **Fields** from the context menu.

3. In the References text box, add the `renderer` qualifier inside curly braces (as shown earlier).
4. Click **OK**.
5. If you have already created repeating rows or row groups in a table, repeat steps 1 through 4 for each row or group.

3.1.3 Built In Boolean Renderer

Docmosis can format boolean (true/false) data into several presentational styles using the built-in "boolean" renderer. This renderer exists since true/false can often be better displayed in a document by Yes/No, Y/N, tick/cross etc.

The built-in Boolean render takes a single parameter indicating the way the true and false values should be displayed. The following table lists the built in values that may be passed as a parameter.

Parameter	Effect
No parameter	true is rendered as "true" and false as "false"
"yn"	true is rendered as "Y" and false as "N"
"ynlc"	true is rendered as "y" and false as "n" (lower case)
"yesnouc"	true is rendered as "YES" and false as "NO" (upper case)
"yesnolc"	true is rendered as "yes" and false as "no"
"yesno"	true is rendered as "Yes" and false as "No" (mixed case)
"windings1"	true is rendered as a windings tick and false as a cross



When this document is then rendered, the renderer will place the correct wingdings characters into the document.

Docmosis Template Example

Identity Provided

Passport	*
Driver's Licence	*
Residential Bill	*



Important

Using specific fonts may cause issues if you then migrate your system to another platform. You should always confirm the operation of your template in all its intended system environments.

To insert a formatted boolean value element:

9. Insert the element using the basic element procedure (see page 18).
10. When you are happy that the element is correct, select it and format its characters using the font you require for the resulting symbol.
11. Work with the application developer to ensure that the Docmosis data formatter returns the appropriate character values for the true and false conditions.

3.1.3.2 Using the Dingbats Boolean Renderer

The Boolean renderer also provides the ability to render dingbats character replacements. Using dingbats does not require any changes to fonts in the templates as is required for the wingdings formatter.

You may find that Word does not understand the dingbats characters, so if you choose Word as the output document type, you typically would not use dingbats character renderers. The dingbat Boolean renderer can be used with Word or Writer templates, the effect is only an issue in the output document.