DocWeb

DTM Version 4 Designer - User Guide

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Overview

DTM V4 includes a brand new Designer that has been developed using React 17 and HTML5 standards. The new designer comes with some enhancements as compared to the previous editor:

- Ability to reorder pages in a DTM template
- View Source functionality (for advanced users)
- Dynamic fields shortcuts facilitate addition of fields/images/message blocks without having to drag and drop
- Improved session management by notifying the user when a session is about to expire along with the option to extend the session
- New Design elements like:
    - Access custom bullet points in addition to the standard bullet points
    - Create dashed/dotted/solid horizontal lines
    - Add background images or color to existing tables/text

Accessing the Designer

Follow these steps to edit a new or existing document template:

1. Click Application Setup,
2. Click the application you wish to configure,
3. Click Document Template Manager,
4. Check out the template you wish to edit,
5. Click Edit in the Action column to open the template in the DTM Designer.

The Designer has some traditional editor features including text areas for typing text and a toolbar across the top for formatting text and inserting elements such as tables, lists, or horizontal lines.

Depending on the base layout of the template, there will be one or more text editors and some editors such as the *Remit To* area may be marked as read-only.

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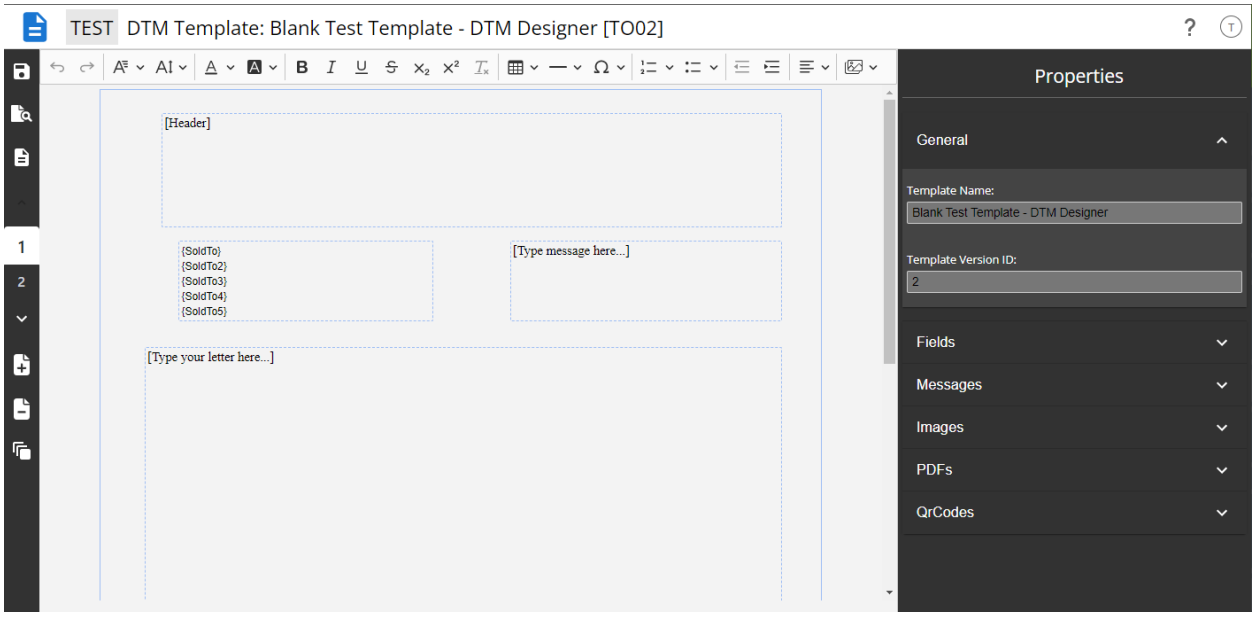

Left Navigation Menu

The **action menu** (panel on the left) contains the following functionality:

Save – Save changes made to all editors on the current page

Preview – Download a pdf containing a preview of the template, giving a general idea of the current layout

Sample – Download a pdf containing the preview populated with sample data

Page Navigation pane – Use arrows to scroll up or down (which will be darkened if already at the top/bottom of the list) and the page numbers. The current active page will stand-out with a white background and black text. Additionally, you can use the scroll wheel of the mouse to scroll through the list of pages.

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Add New Page – add a page at the end of the list of pages (i.e. if there are 2 pages, it adds page 3 at the end)

Remove Last Page – remove the last page from the end of the list of pages (i.e. if there are 2 pages, it removes page 2)

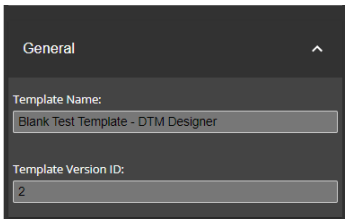
Reorder Pages – open a popup that enables you to reorder all of the pages, with the exception of the first page. That one will always remain first. See details here

Right Side Menu

The **side menu** (panel on right) contains the Template Properties which include:

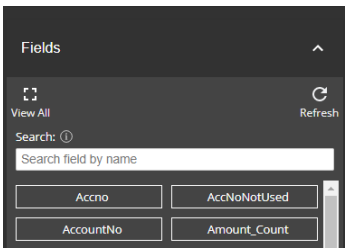
General

The General drop-down contains some basic information.



The Template Name can be changed using the Edit Properties link in the Document Template Manager under Application Settings.

Fields



A list of the available target fields.
Includes a button to view all, or search by name. You can drag the fields from the list into the desired editor, or find them by typing { in the editor and typing in the required field name.

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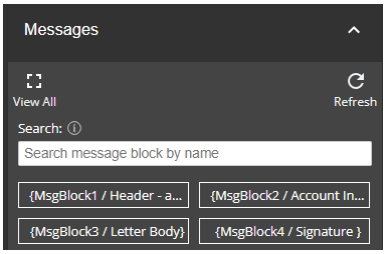
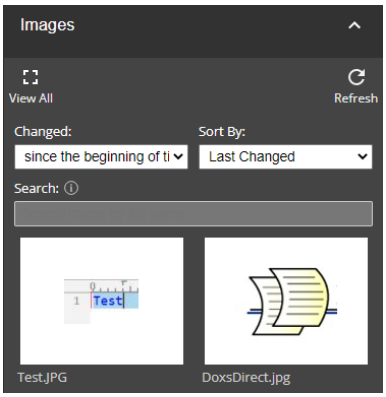
Messages



A list of the message blocks available to the template. Only messages that have been promoted to production will be visible here. As with fields,

- View all of the messages
- Search by message name OR
    - Drag a block into the editor OR
    - Use the { character in an editor box to search

Images



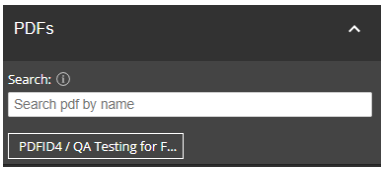
A list of available images.

- Drag and drop the image into the text area
- View all images,
- Change the sort order
- Search by image name

Once in the text editor, you can use a toggle box to format the image. Here are some options for what you can do:

- Text wrapping
- Caption toggling (the alt text of the image, which can also be altered),
- Image alignment
- Image resizing using a drag function

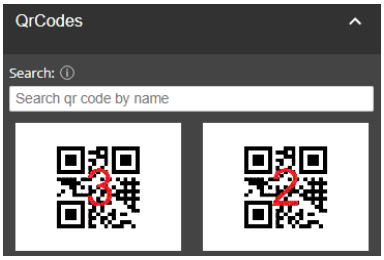
PDFs



A list of PDFs available to the template.

- Functions work like fields & messages.
- Drag and drop the text, or use the { character to search for the pdf by name.

QR Codes



A list of available QR codes.

- Functions work like the image list.
- Drag the desired QR code to the editor window.
    - There it will get the same image toggle box and can be resized.

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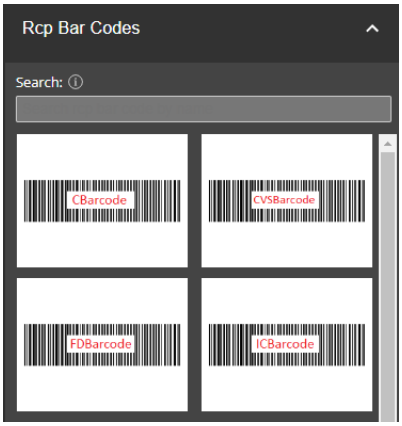
RCP Barcodes



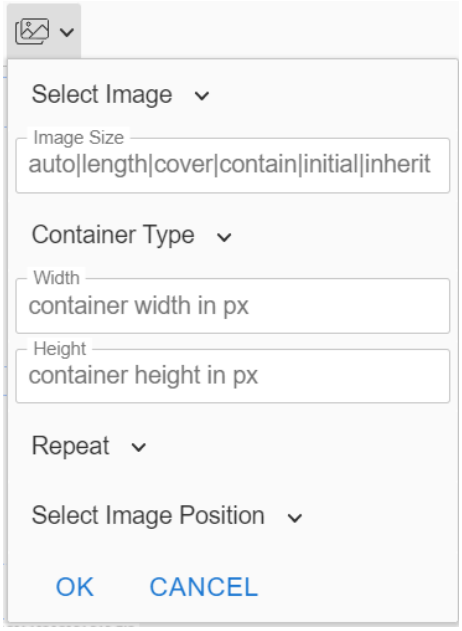
If RCP Bar Codes are enabled for the application, they will appear here.

- If the barcode is an image, it will function like other images or QR codes.
- If it is text only, it functions like the messages or fields.

Custom components on the Editor

Background image tool

The background image tool in the toolbar is a custom function. If you click it, you'll see something that looks like this:



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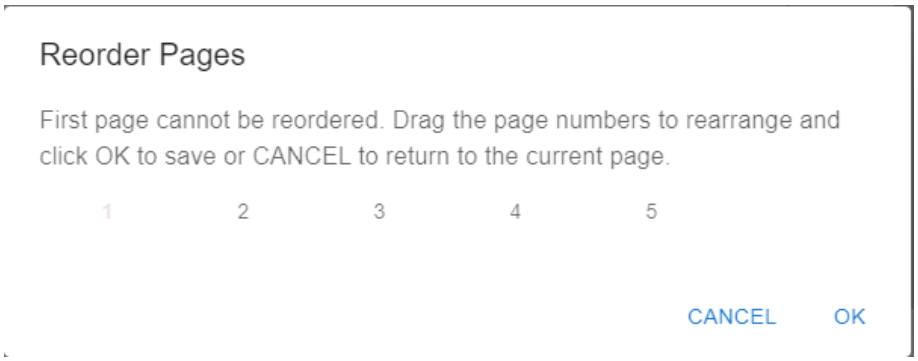
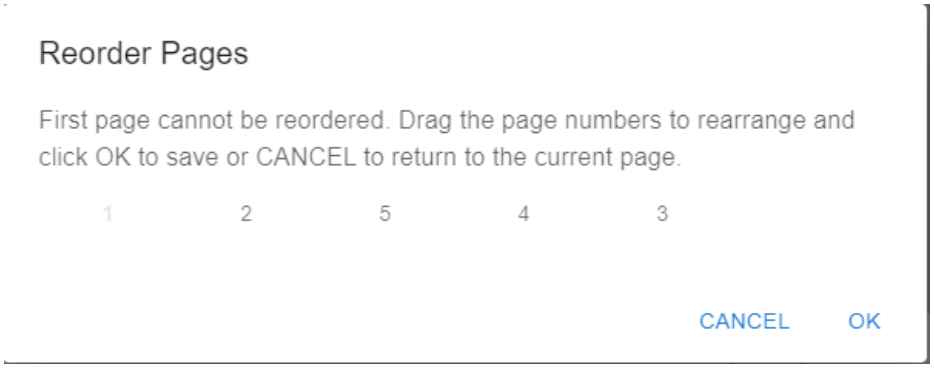
The drop down contains the images from the side menu with formatting options such as image size, repeat type, and image position. You can choose to create a new container (table or div) or if you select a block of text or a table, you can add the background image to the existing container.

Reorder Pages button

The Reorder Pages button will open a popup like this:



All but page one can be dragged into a new order, so you get something like this:



Once you click ‘OK’, the pages will be reordered. If you hit ‘Cancel’, no changes will be made.

View Source Functionality

The View Source feature of the Designer enables you to view the source HTML of the active editor you have selected. An active Editor is an Editor where you have placed your cursor.

Notes:

- If none of the editors is selected in the page, the first editor is shown by default.
- View Source does not work for the uneditable portions of the DTM Template as we do not allow users to edit those portions.

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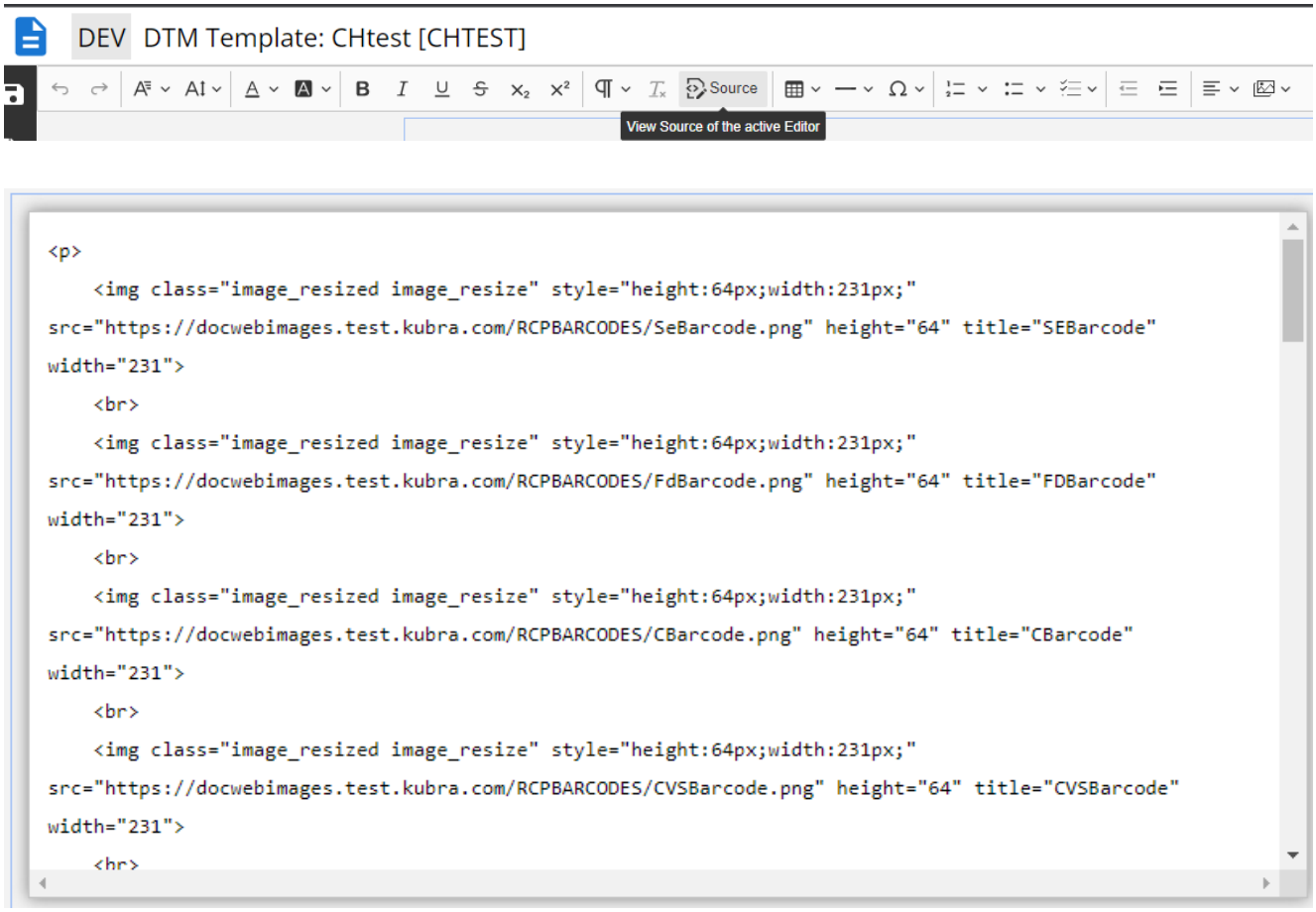
- You can modify the HTML and place a custom content's HTML in the text area and toggle back the source button to show the editor view.
- You are encouraged to **verify** the output through viewing samples and previews.



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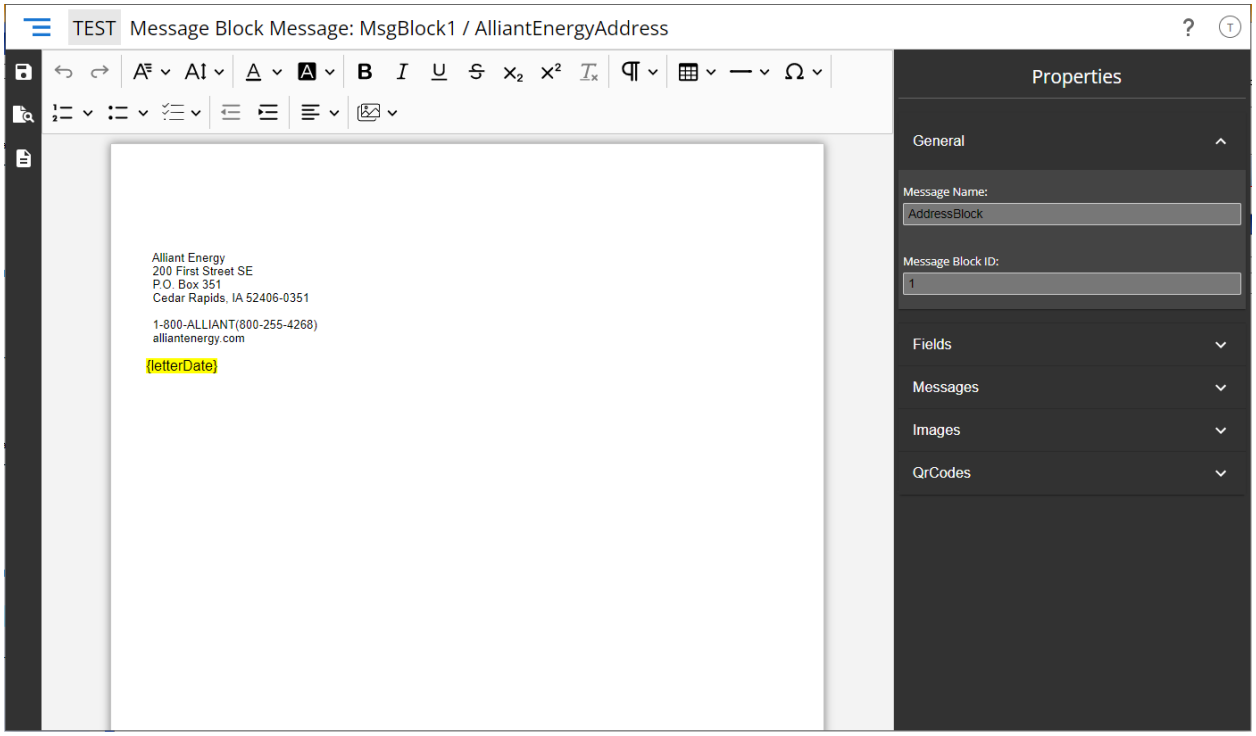
Message Block Message

To edit a new or existing message block message, perform the following in order:

1. Click Application Setup.
2. Click the application you wish to configure.
3. Click Document Template Manager. You will see a dropdown. There, continue with the following steps.
4. Click Message Blocks.
5. Edit the block containing the message you wish to update.
6. Choose the Message Block Messages tab.
7. Check out the message you wish to edit
8. Once checked out, click Edit in the Action column to open the template in the Message Block Message Designer.



The Message Block Message Designer is very similar to the DTM Designer with some minor differences or caveats.

Left Navigation Menu

The panel on the left (the **action menu**) contains the following functionality:

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Save – Save changes made to all editors on the current page.

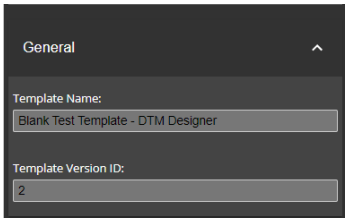
Preview – Download a PDF containing a preview of the message which gives a general idea of the current layout. It will not show you what it looks like in a template.

Sample – Download a PDF containing the message loaded into a template with sample data. This will only work if the message is currently In Production and being used in a template.

Right Side Menu

The **side menu** (panel on the right) contains Message Properties which includes:

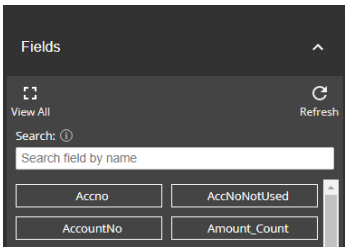
General



The General drop-down contains the following basic information:

- **Message Name** - Can be changed using the Edit Properties action link in the Message Block Messages tab of the Message Block.
- **Message Block ID**

Fields



A list of the available target fields.

- Includes a button to view all or search by name. y
- Fields can be dragged from the list into the desired editor, or can also be found by typing { in the editor and typing in the required field name.

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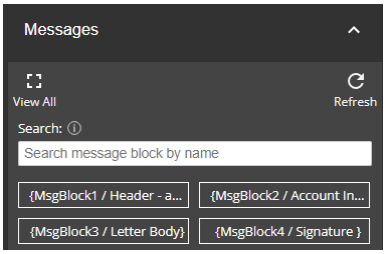
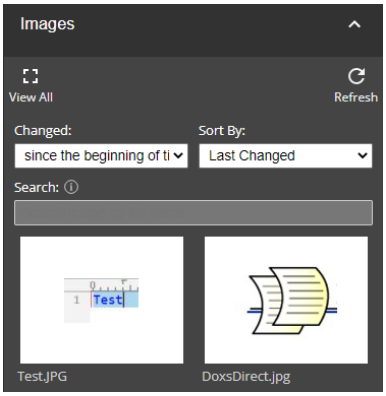
Messages



A list of the message blocks available to the template.

- Only messages that have been promoted to production will be visible here, and the current message block will be excluded from the list.
- As with fields, you can view all of the messages, search by message name, drag a block into the editor, or use the { character in an editor box to search.

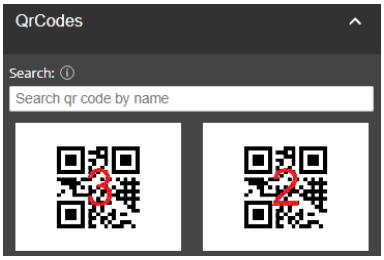
Images



A list of available images.

- Drag and drop the image into the text area, view all images, change the sort order, or search by image name.
- Once in the text editor a toggle box is available for formatting the image: text wrapping, toggling the caption (the alt text of the image, which can also be altered), image alignment.)
- Resize the image by dragging the corners to the size you want.

QR Codes



A list of available QR codes. Functions much like the image list.

- Drag the desired QR code to the editor window where it will get the same image toggle box and can be resized.

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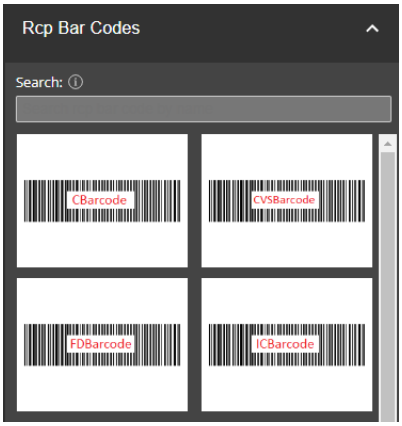
RCP Barcodes



If RCP Bar Codes are enabled for the application, they will appear here.

- If the barcode is an image, it will function much like other images or QR codes.
- If it is text only, it functions like the messages or fields.

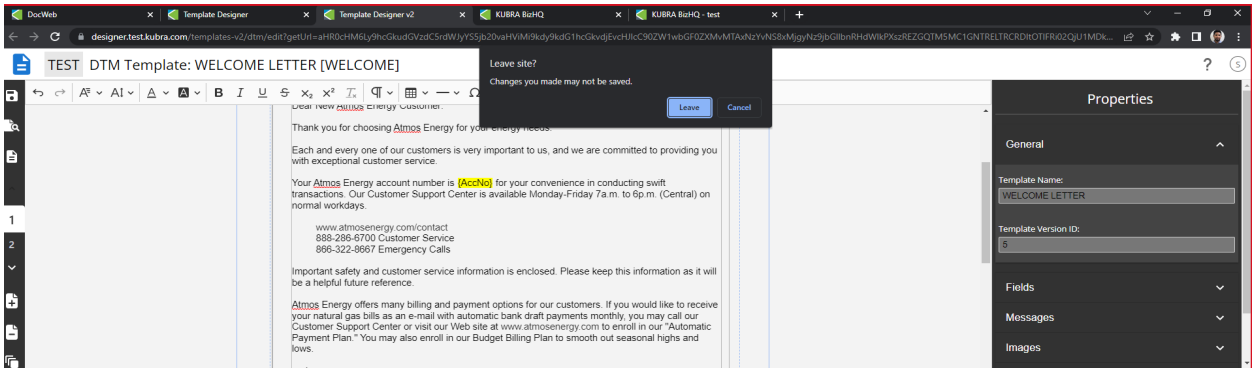
The tool bar is identical to that of the DTM Designer.

Session Timeout

Pop Ups

Leaving the site

Below is a sample image of the popup that appears when you leave the site while using the Designer and you have unsaved content on the page.



Session Expire warning

Below is a sample image of the popup that appears when your session is about to expire.

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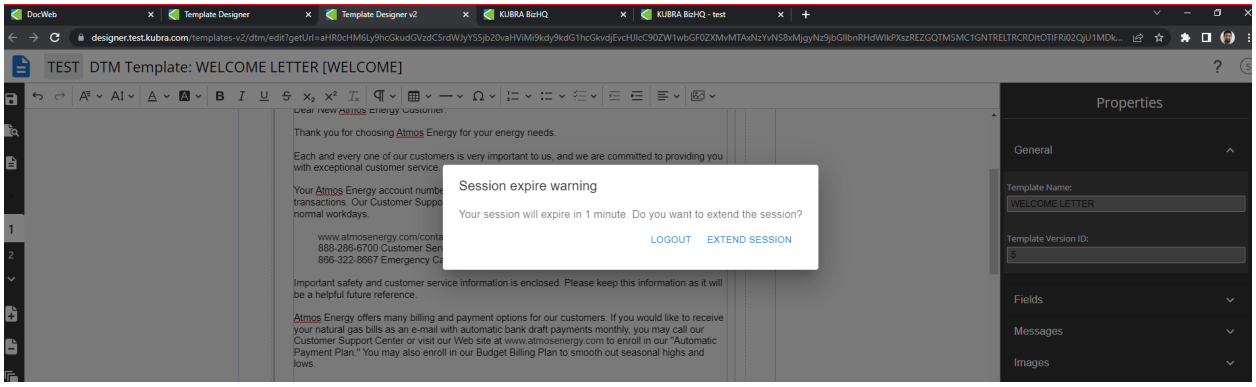

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Template Manager Best Practices

KUBRA strongly advises incorporating these key design elements and concepts into your document.

Working with Tables

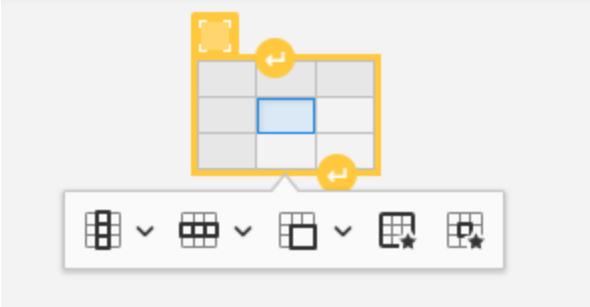
Rule #1 : Use tables for page layouts

Why do we advise you to use tables?

- Organize content easily.
- Make your content look great.
- Hold text, graphics, or other tables.
- Simplify even the most complex layouts.

Tables are one of the most powerful and flexible features available for your documents. They are generally required when trying to achieve proper alignment for a variety of objects with the DTM tools. When working with tables in the editor, there are a wide variety of options and tools.

Clicking on a table brings up the options to manage the table/cell properties.



Left to Right, the icons in the above image allow you to manage

- Column Properties
- Row Properties
- Merge Options
- Table Properties
- Cell properties

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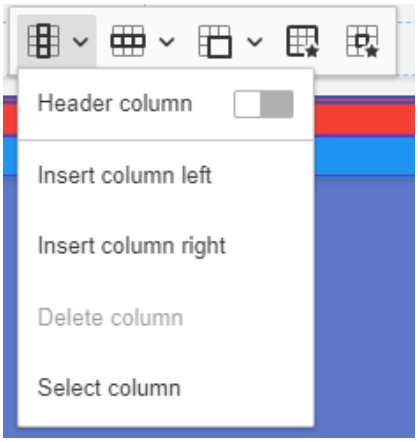
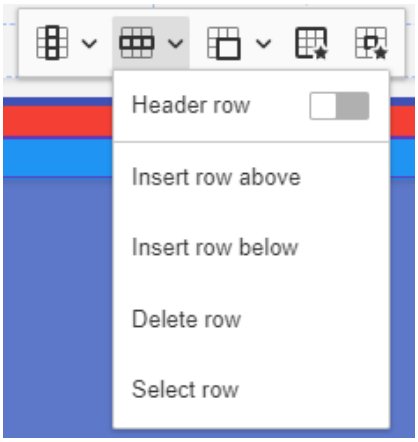
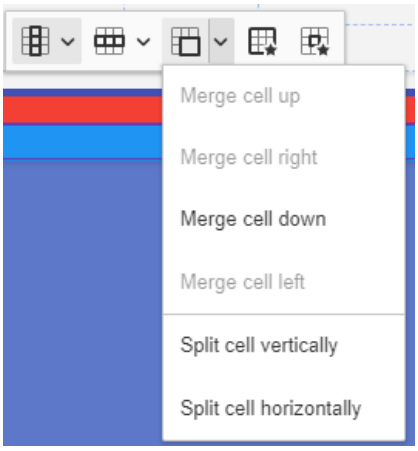
Column Properties - Lets you add a Header column to your table, Insert columns to the left and right, or Delete a column.



Row Properties - Lets you Insert Header or standard rows above or below. and delete rows.





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Cell Properties – Accessible by clicking anywhere in a cell (make sure the cursor is in the correct cell) and then clicking on the ‘Cell properties” icon. Set the background color for the cell, borders for the cell, text alignment in the cell, padding etc. Any formatting specified here overrides the formatting set in the table.

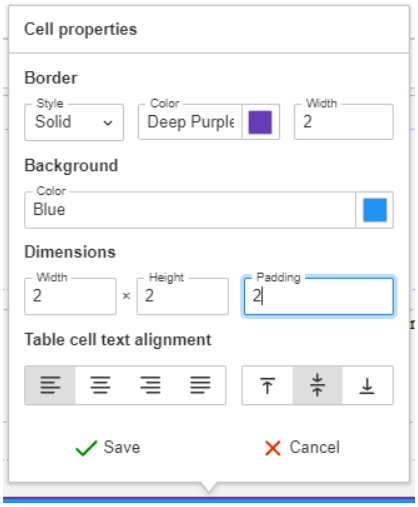

Table Level – Accessible by clicking anywhere within any cell and then selecting the ‘Table properties” icon. This should normally be used for setting table height, width, and table borders. You can also select the Border color and the Background color from here.

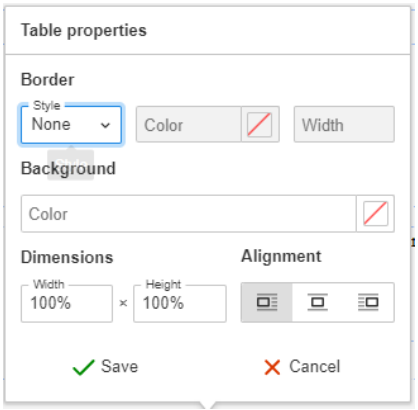

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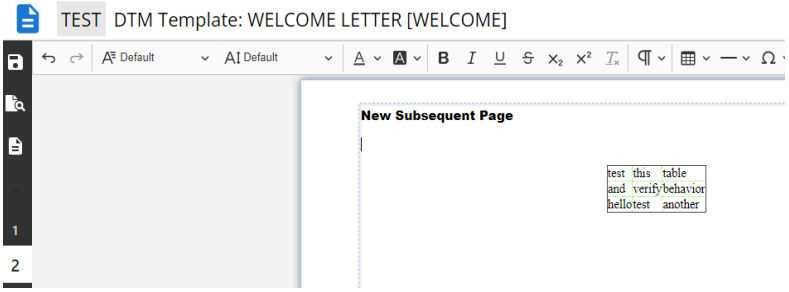
Table Advanced Properties – For any additional styling needs, use the *View Source* menu option to access the source code and add classes.

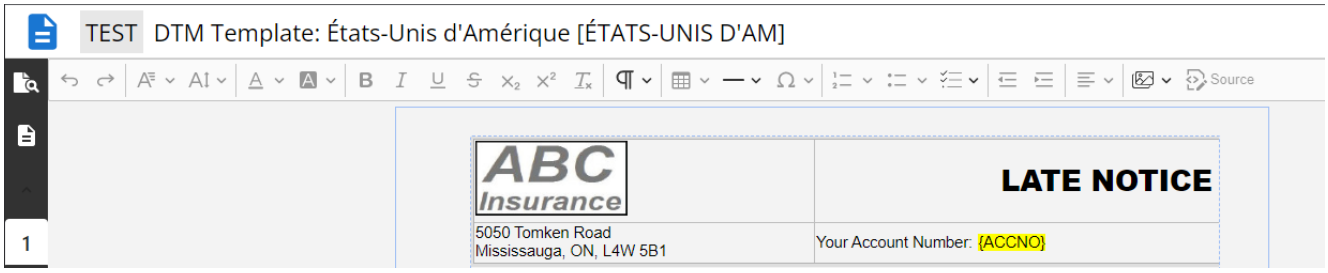



```
<figure class="table">
    <table style="border-color:hsl(0, 0%, 30%);border-style:double;">
        <tbody>
            <tr>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    test
                </td>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    this
                </td>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    table
                </td>
            </tr>
            <tr>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    and
                </td>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    verify
                </td>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    behavior
                </td>
            </tr>
            <tr>
                <td style="border-color:hsl(90, 75%, 60%);border-style:dotted;">
                    hello
                </td>
```

View Source could be used to view the HTML of the underlying table and add custom properties to the table which are not available through the editor. Example: table padding & spacing.

Example 1 – Headers

The image below is a Header section that spans the entire width of a page. If you didn't use a table, the entire right part of the section would have been unusable.



The table's original size was 2x2 meaning 2 rows and 2 columns. In this example, the image and the return address only utilize 1 row. Here is how you can do this easily:

1. Click inside one of the vertical cells.
2. Select the third "Merge Cells" table dropdown option. Click on 'Merge cell down', merging two vertically adjacent cells into one.
3. Align the image and address horizontally.
    a. To access alignment options of a cell, click on the "Cell properties" table option. (make sure the cursor is in the correct cell.)
    b. Under Table cell text alignment, choose style accordingly.

The second column still utilizes two rows. The title is right aligned whereas the subtext is left aligned, giving you greater flexibility in aligning the text according to your requirements.

Example 2 - Summary Information

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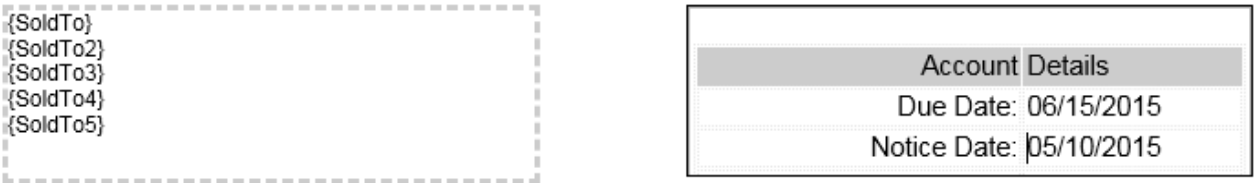
The image below displays an Account Summary section. This example will illustrate the table used in the Account Summary section to align multiple lines of data.



1. Enter the information into a table with two columns and four rows.
2. Merge the title row into a single column, center aligned and format with a gray background.
3. Align the data below accurately using the two columns
4. Justify right the left column and left justify the right column. This allows you to keep different lengths of text aligned in an easily readable format.

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