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Document Design Tutorial

Match-IT can generate all your business documents for you. This includes: quotation letters, purchase orders, works orders, dispatch notes, invoices and many others. Their papers are the way the information is arranged on the page together with any formatting information.

Your document designs will be very specific to your business, and often, specific to a particular product or customer as well. Match-IT recognises this and provides facilities that allow you to define as many designs as you like. Match-IT will pick the design that is appropriate to the context whenever one is required.

The purpose of this tutorial is to describe how to use the integrated paper designer to create your document designs. It is not intended to explain every tool and function of the designer; rather it aims to introduce you to enough of its features to enable you to develop an understanding of how it works and what can be achieved with it. Once you have done this, it is recommended that you examine the sample designs that came with your installation with a view to using them as a basis for your own designs.

The paper designer works in a similar way to other designers that you might have used – for example there may be one included with your accounts system (e.g. Sage Line 50 and 100). Some experience with this type of facility is assumed in this tutorial. In addition, you may need to use some of the designer's functions whose syntax is similar to those found in many spreadsheet packages; familiarity with the use of these is therefore helpful. Finally, this tutorial assumes you are familiar with the Match-IT product.

1 What is a paper design?

A paper design is the set of instructions that defines how Match-IT is to create each of your printed business documents. These instructions include which pieces of information you want to include in the document, where on the page they should be printed and how they should be formatted. They can also include quite complex refinements to allow different information to be printed in different circumstances. Finally, your paper designs can incorporate fixed text, lines, boxes, graphics (e.g. logos) and – where appropriate – bar codes.

Match-IT incorporates an integrated paper designer – Combit *List & Label* – that enables you to generate these instructions visually and interactively.

2 What are the design considerations?

The single design restriction placed on you is that you can only use the fields (information) that Match-IT makes available to *List & Label*. However, a very large number of such fields are available, including all the ones you are most likely to need. Beyond this, you can produce anything that *List & Label* is capable of. However, there are a few general points to note:

- An early decision you will have to make for each document type is whether you want it printed in portrait (top along the short side of the page) or landscape (top along the long side) orientation. Portrait has the advantage that more lines of detail can be printed before the document runs to more than one page. With landscape orientation the extra page width allows you to accommodate more columns of information in the detail section. While the choice is entirely yours, it is suggested that many businesses now find that landscape orientation works best for the majority of their documents.
- Most of your business documents will consist of a header area (who the document is to, when it was created, its identifying number, etc.) followed by some lines of detail (typically the parts being quoted, ordered, dispatched, invoiced, etc.). It's much easier to design your papers if you keep the header information vertically separated from the detail information.
- Match-IT provides a large number of fields (places to hold your business information), the detailed use of which is often up to you; this applies particularly to notes. When deciding what sort of information you are going to put in each of these fields, you should always be mindful of whether you will want to print it in any of your business documents. In particular, you should avoid mixing 'internal' information (intended only for use within your company) and 'external' information (intended for your customers or suppliers) in the same field.

Creating and refining your designs can be quite time-consuming. If you intend to have more than one version of each type of business document (foreign language version(s) of documents you send to your customers, for

example), you will minimise the time it takes if you get your 'master' version of each document type right before creating variants and derivatives based on that master. This is because you can use the master version as a basis for each variant; this will be much quicker than starting each one from scratch.

3 How do I start the paper designer?

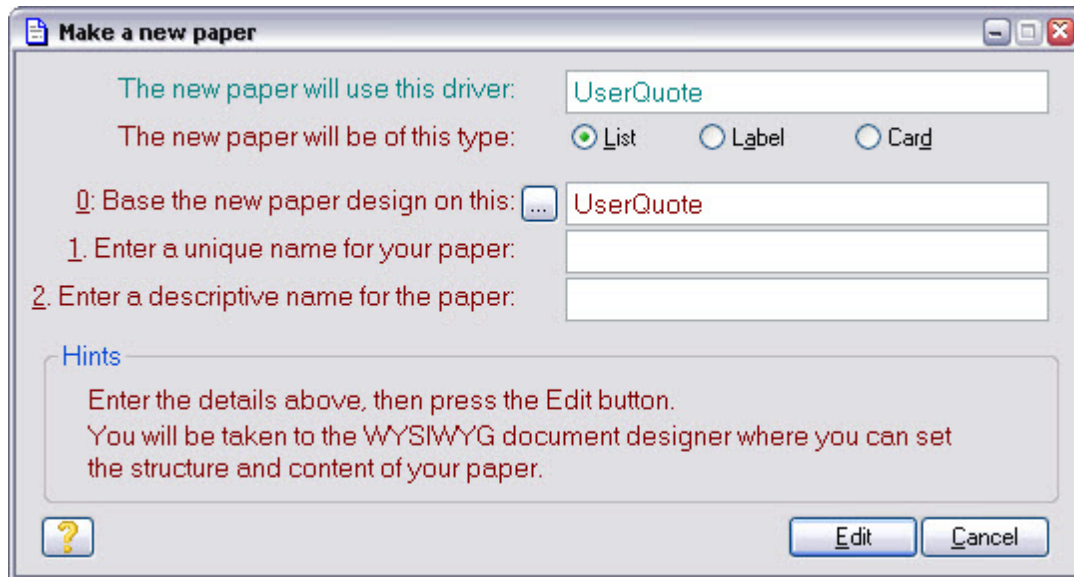
This topic will explain how to use *List & label* by taking you step by step through the processes involved in creating a simple example paper. It can be read alone, but is best used as a guide to actually performing the example in the system itself.

The procedure we will perform here is to create a quotation paper to send to a customer in response to an enquiry. Most of the same steps are involved in creating any other type of paper, although differences will be pointed out as we go along.

From the standard menu press **Favourites | Functions | Setup | Setup Documents | Report Layouts**. This will present you with a list of all the layouts. (If your menu structure is not the standard, you can also get there via *Processes/Go Anywhere*, then find the *Report Layouts* function in the OP group and **Execute** it.) From the layout list, select the one called **UserQuote** and press **Detail**. Select the second tab (Paper). You will be presented with a form similar to the one below.

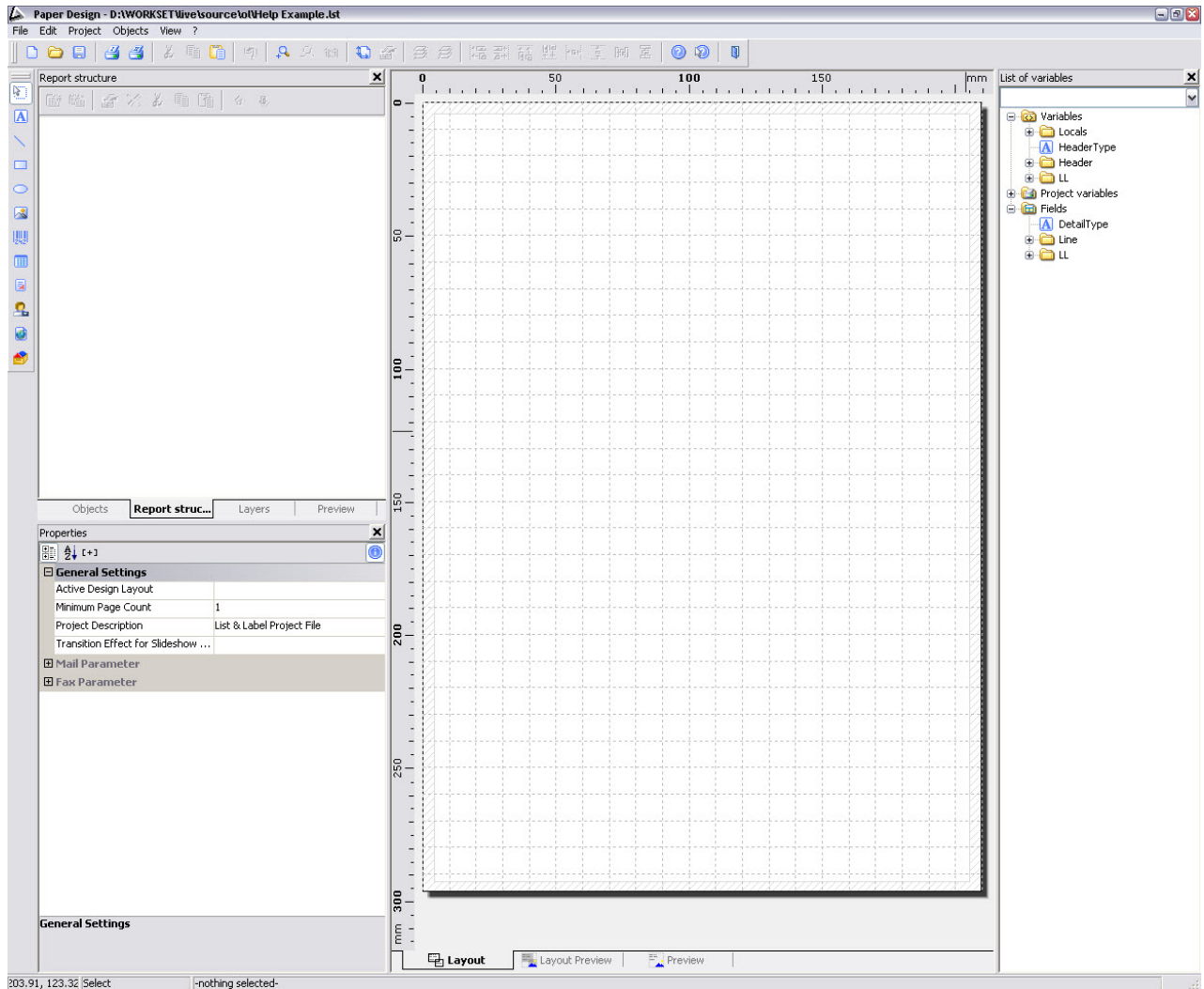
The screenshot shows a window titled "Report Layout" with a tabbed interface. The "Paper" tab is selected. The "Layout Name" field contains "Quote" and the "Layout ID" field contains "UserQuote". Below these are three tabs: "1 Detail", "2 Paper" (selected), and "3 Linked To...". The "Paper" section includes a "Paper:" dropdown menu with "UserQuote" selected and a "Document Ref:" field. A "Paper properties" section contains "Class:" (Quote), "Generator:" (Match-IT), and "Driver:" (UserQuote). There are three checkboxes: "Can Be Edited" (checked), "Requires name list" (unchecked), and "Output To File" (unchecked). A "Defaults" button with a "Papers" sub-button is located at the bottom left. At the bottom of the window are buttons for "<Back", "Next>", "New", "Reset", "Del", "Save", and "Close".

Press the **...** button beside the **Paper** field; a list of existing quotation paper designs will appear. Press **New** to reveal the form similar to the one shown below.



If we had already created a master quotation paper to use as the basis of a new version, we would enter its name in the space provided at **Base the new paper design on this**. However, in this exercise we will start from scratch, so delete whatever is now showing in this space (so that it's left blank), and press **Edit**.

This is the point at which the *List & Label* designer is started, and since we are starting from scratch, your screen should look something like that shown below:



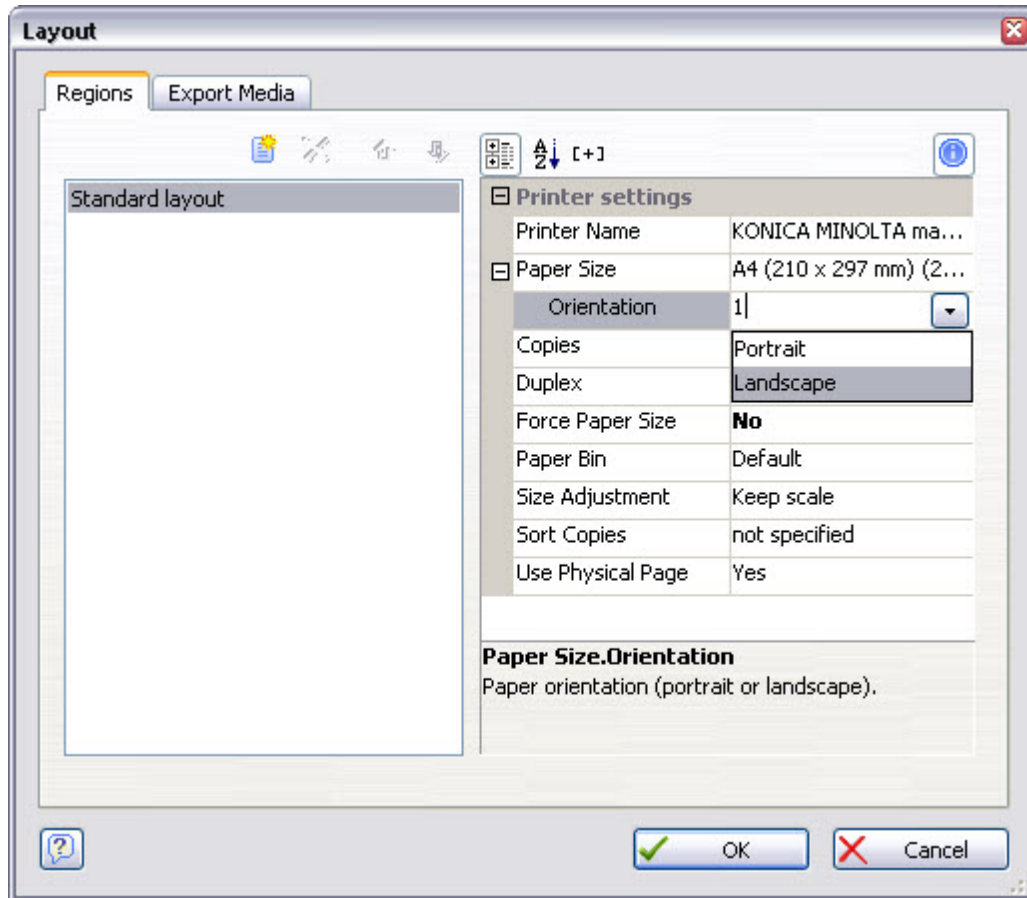
The three tabs at the bottom of the screen – *Layout*, *Layout Preview* and *Preview* all show the same information about what's in your document design, but in slightly different ways. The differences are similar to the alternative views that most word processors offer: 'normal' or 'print layout', for example.

It's generally easier to design your paper using the *Layout* view, but periodically move across to the *Preview* tab to get a better idea of what the printed document will look like. The *Layout Preview* tab is intended to be the best (or worst!) of both. Press the *Layout* tab now.

Note that *List & Label* has its own help system, which is accessed in the usual Windows™ manner. You can use this to learn about controls not covered in this topic, although the system's language is sometimes less than perfect and betrays the product's German origins. This *List & Label* help is entirely separate from Match-IT's own help system.

4 How do I change my paper's orientation?

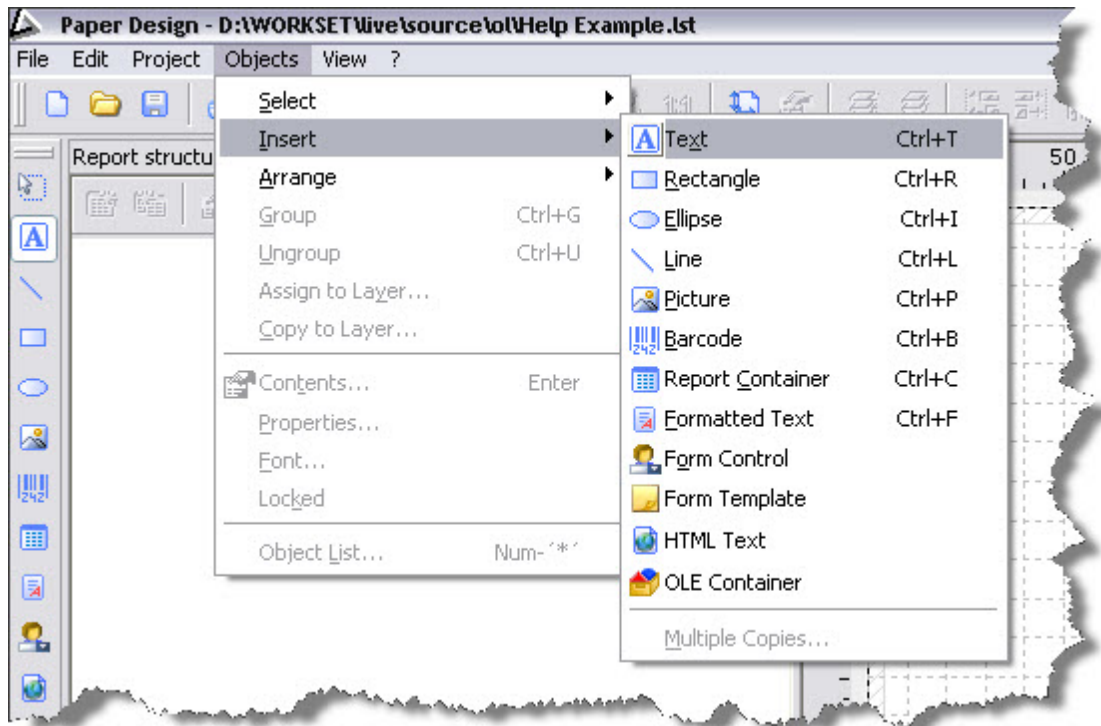
From the List & Label menu bar, select **Project | Page Setup**, a form will appear as shown below.



Select **Landscape** orientation and press **OK**.

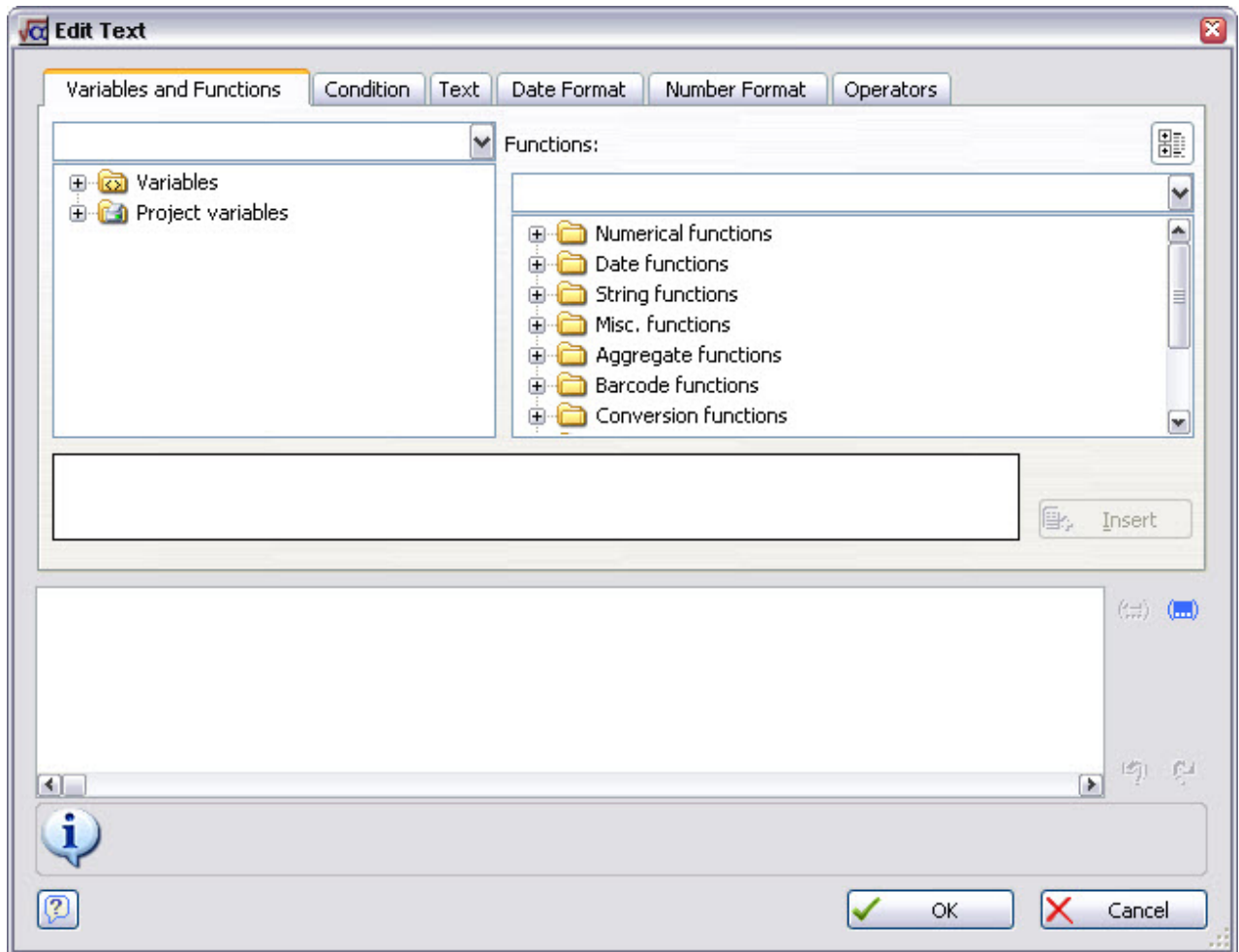
5 How do I put header information into my paper?

From the **Objects** menu, select **Insert** and then **Text** as shown below:



Using your mouse, define the position for the information by dragging the cursor from one corner of an imaginary 'box' to the diagonally opposite corner. Put the box somewhere near the top left-hand corner of the page, but don't worry exactly where – it can be moved and re-sized later.

When you release the left mouse button, you will be prompted for the information to put in the box, like this:



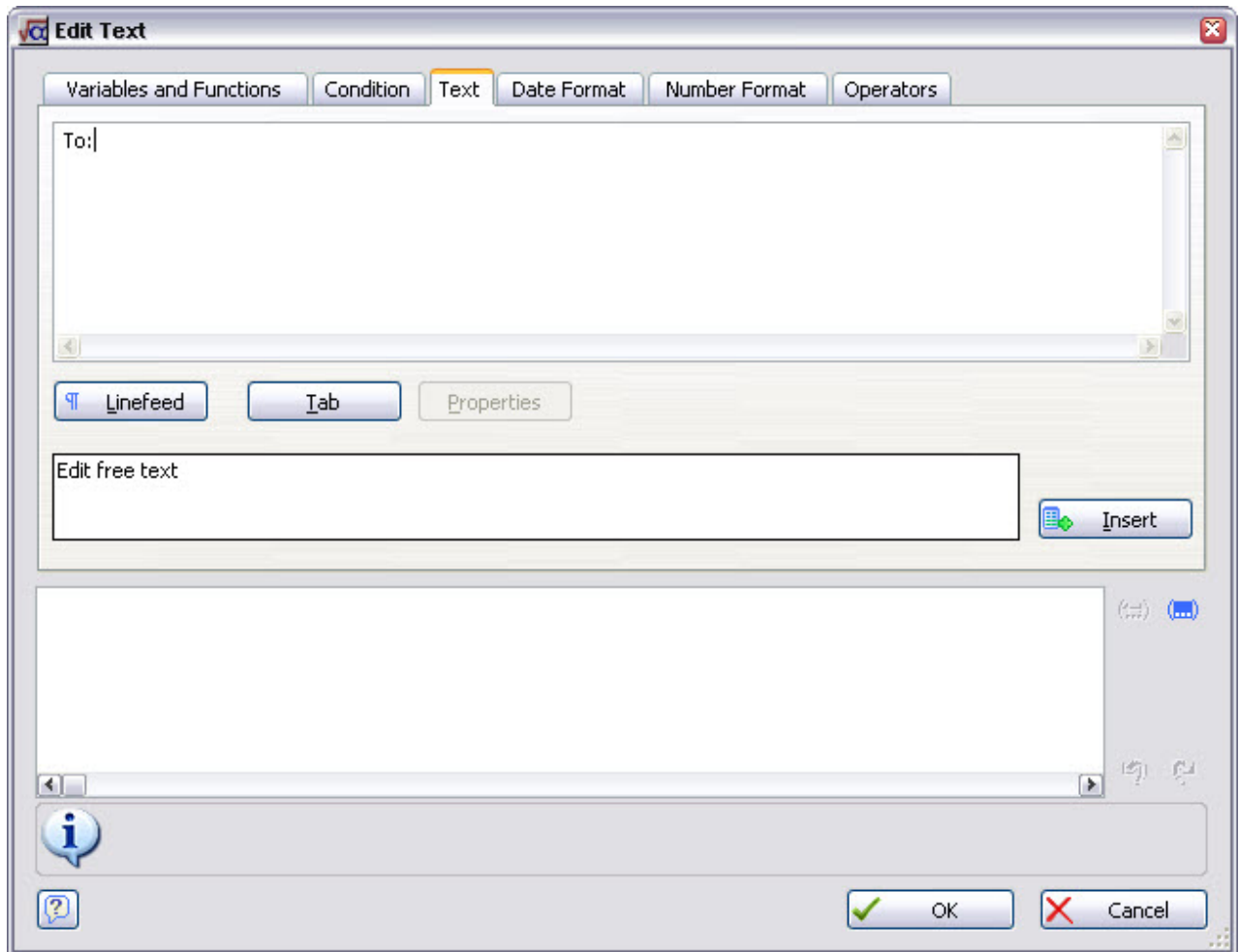
You will spend much of your working time in *List & Label* with this form, so it's worth spending a few moments describing how it works.

The **Variables and Functions** tab is where you specify that you want to put variable information (taken from your Match-IT system) into your paper: a customer name, an order number, part numbers, for example. We will come back to this shortly.

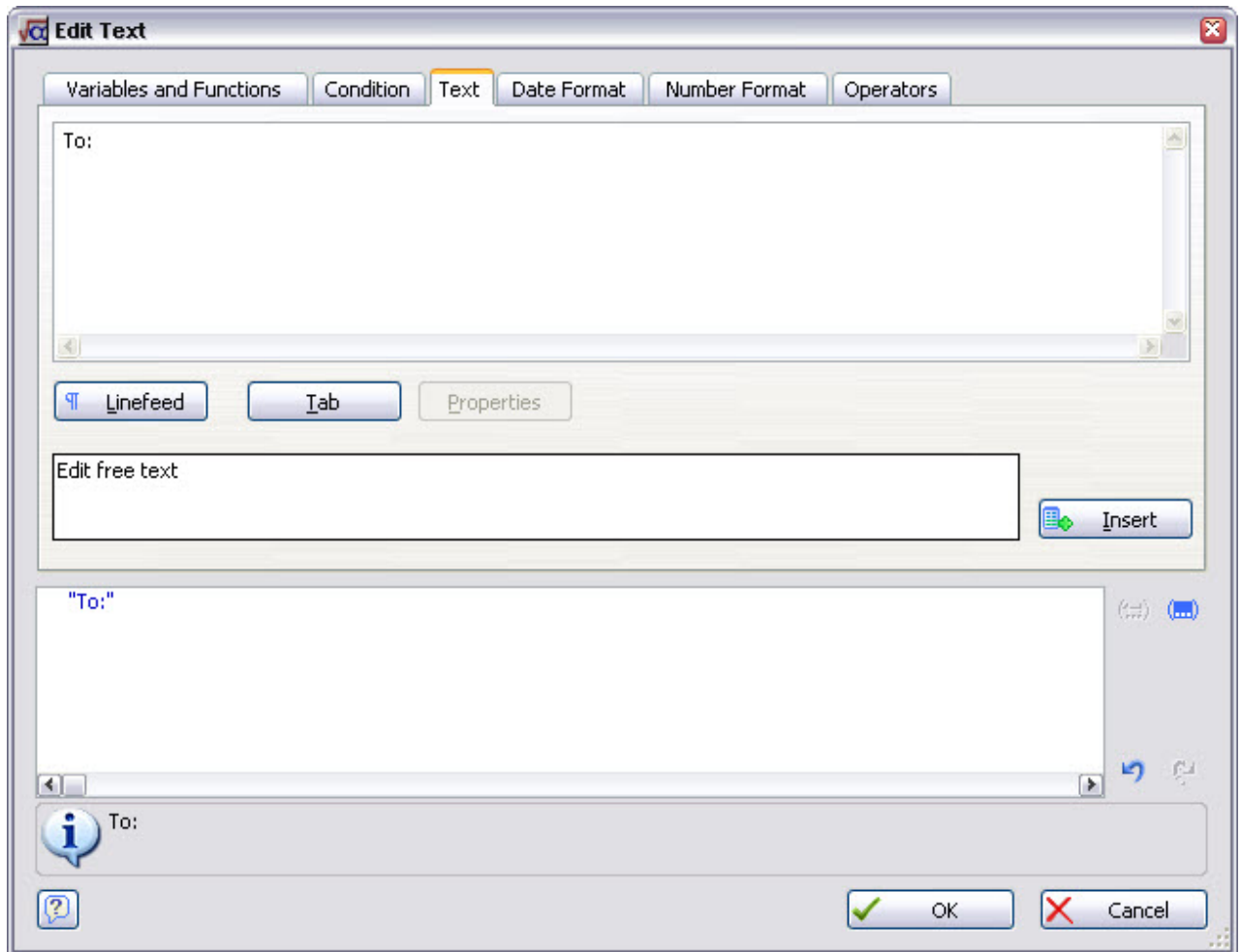
The **Text** tab is where you specify that you want to put fixed text into your paper. In this context, text is words (or numbers) that will never vary when you print your document. Most of this fixed text is likely to be short prefixes to your variable information: "To:", "For the attention of:", "Signed: _____", etc.

The other tabs contain *List & Label's* more advanced features. Don't worry about these for now – we will come back to some of them later.

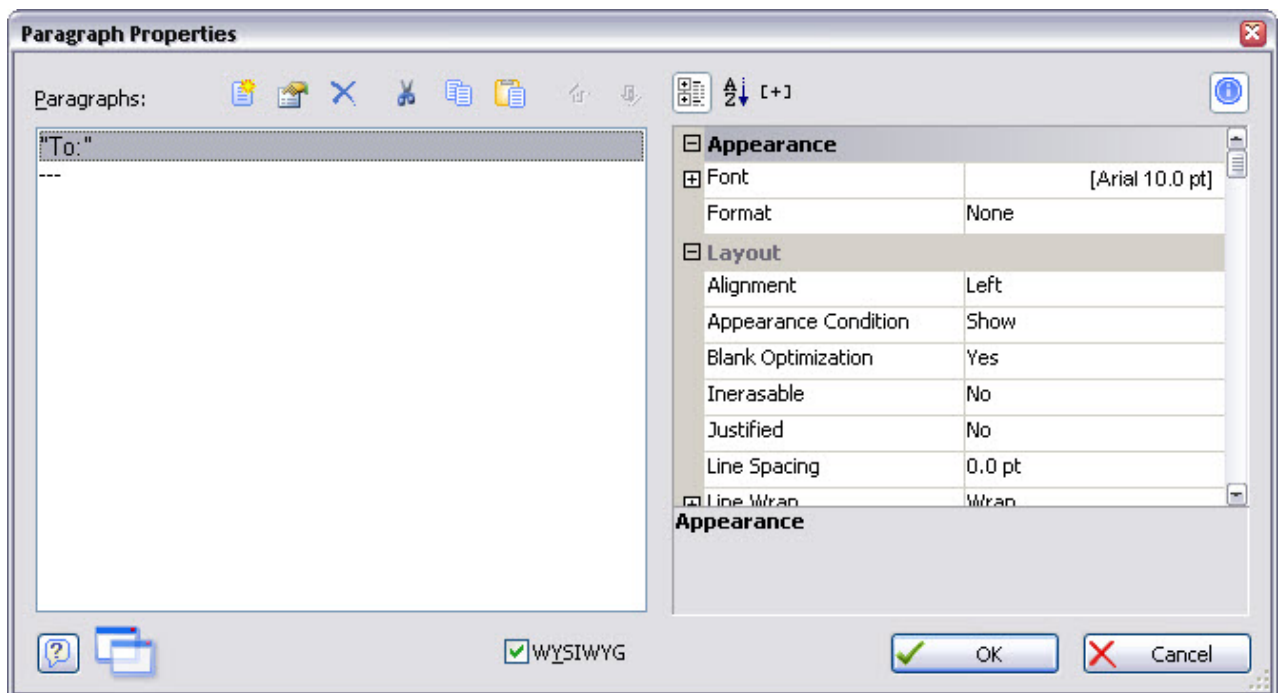
For the moment, let's just put some fixed text on to our quote paper. Select the **Text** tab, and type the word **To:** into the box at the top as shown in the below.




Now press the **Insert** button. You will notice that the text you typed has moved into the box at the bottom of the form, as it is shown below in blue, and that *List & Label* has added quotation marks around it. The quotation marks will not appear on your printed documents – they and the blue colour are merely *List & Label's* way of distinguishing fixed text from other types of information in your paper.

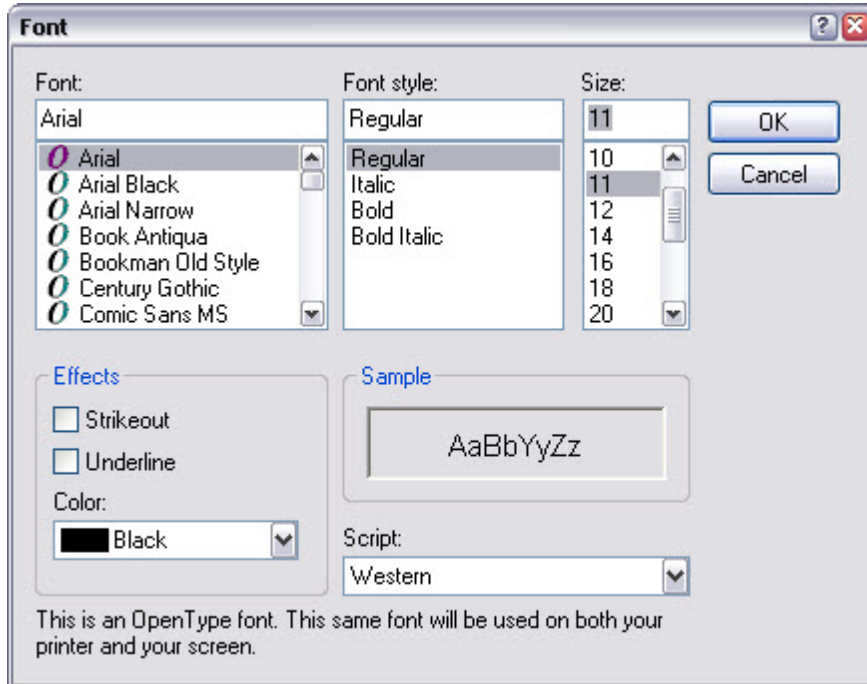


Press the **OK** button. This will take you back to the paragraph properties dialog that *List & Label* opened for you when you released the mouse button while dragging earlier, as shown below:

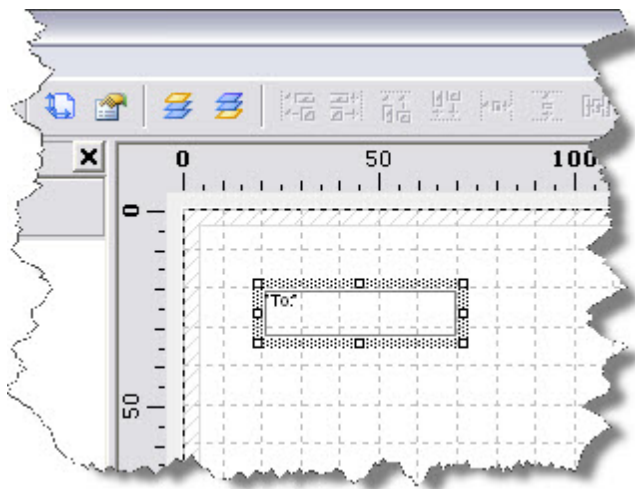


From here, you can change its font, colour, size and other attributes using the controls provided.

Increase the text size to 11 pt, by clicking in right-hand pane of the **Font** property (where it says [Arial 10.0 pt] in the example above) and then clicking on the  icon. This will open the usual *Windows*™ font selection dialog, as shown below.

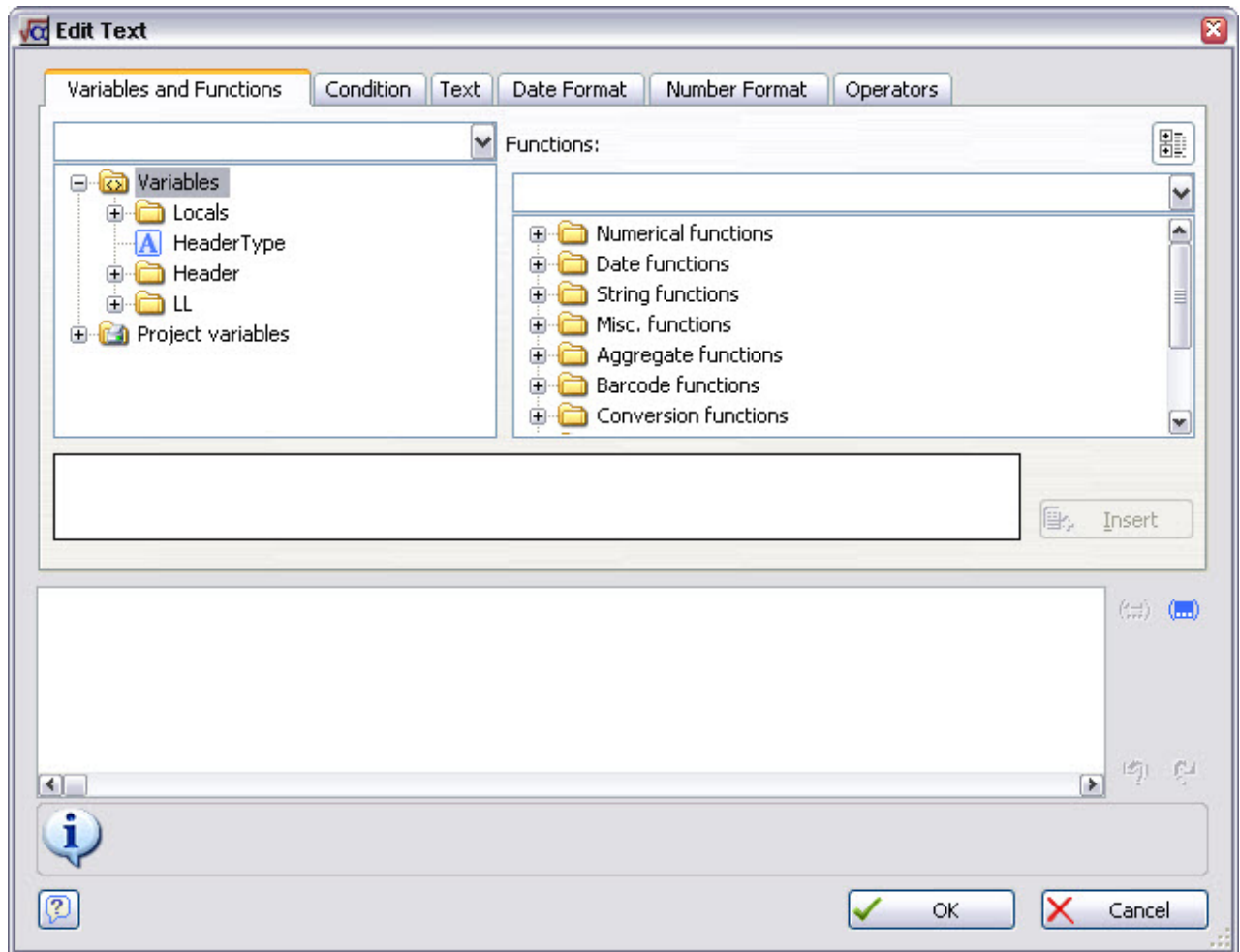


Select **11** pt and press the **OK** button twice to close the forma. Your text should now be visible in the design workspace, like this:

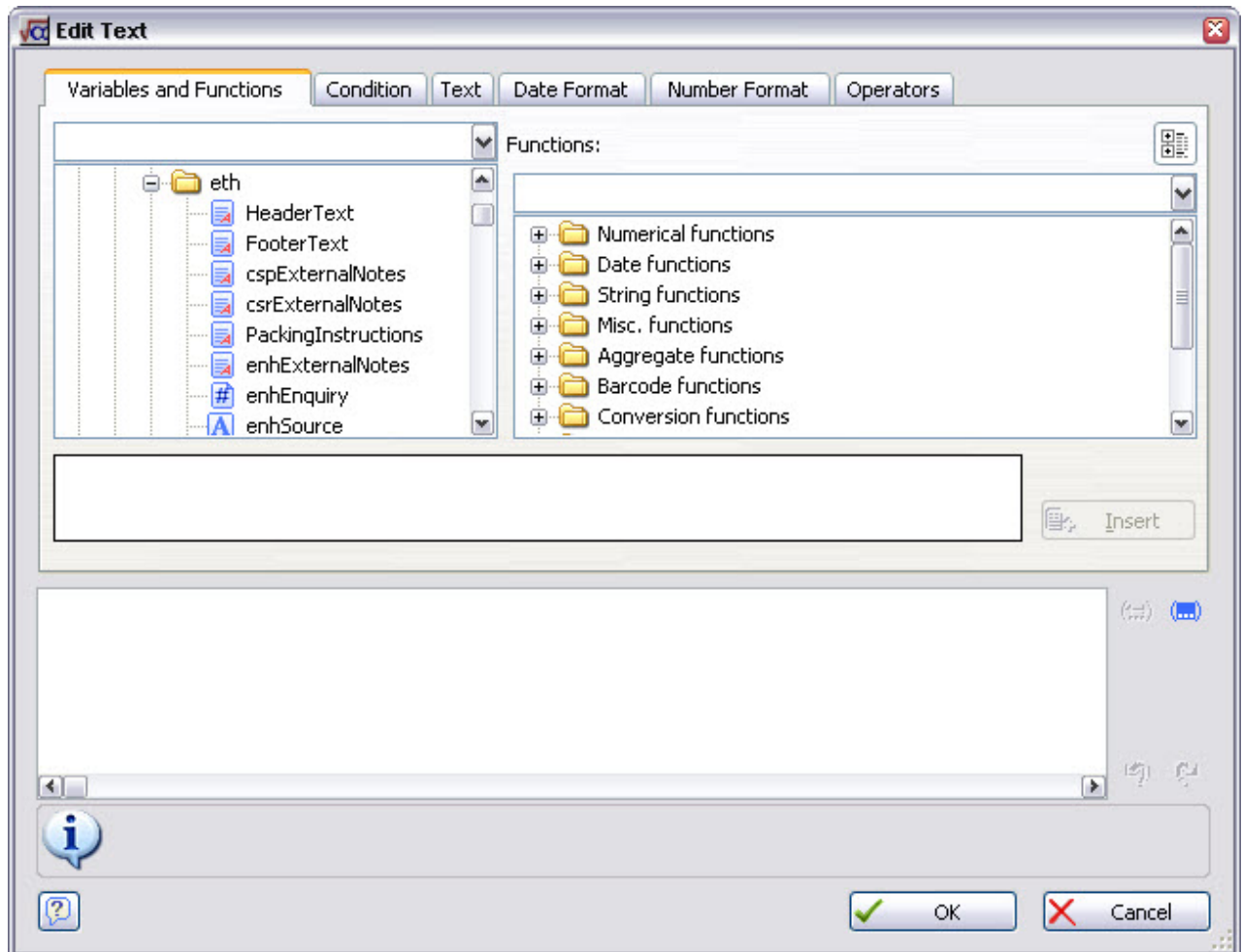


From the **Objects** menu, select **Insert** and then **Text** as before. Using your mouse, define the position for another box to the right of the existing one. The **Edit Text** dialog will open as before. This time, we'll enter some variable information rather than some fixed text.





The variables are gathered into groups, which are accessed, via a tree structure that you will recognise from Match-IT (and other applications e.g. *Windows*™ Explorer). Press the **+** symbol to the left of the word **Variables** to open up the tree, as shown below:



Most of the information we require for the header part of our paper is contained in the **Header** group, so press the **+** symbol to the left of the word **Header** to display a list of Match-IT files available for use in the quote header. The only one showing is `eth` (which is Match-IT's quote header file). Press the **+** symbol to the left of the word `eth` to reveal the list of variables, as shown below:



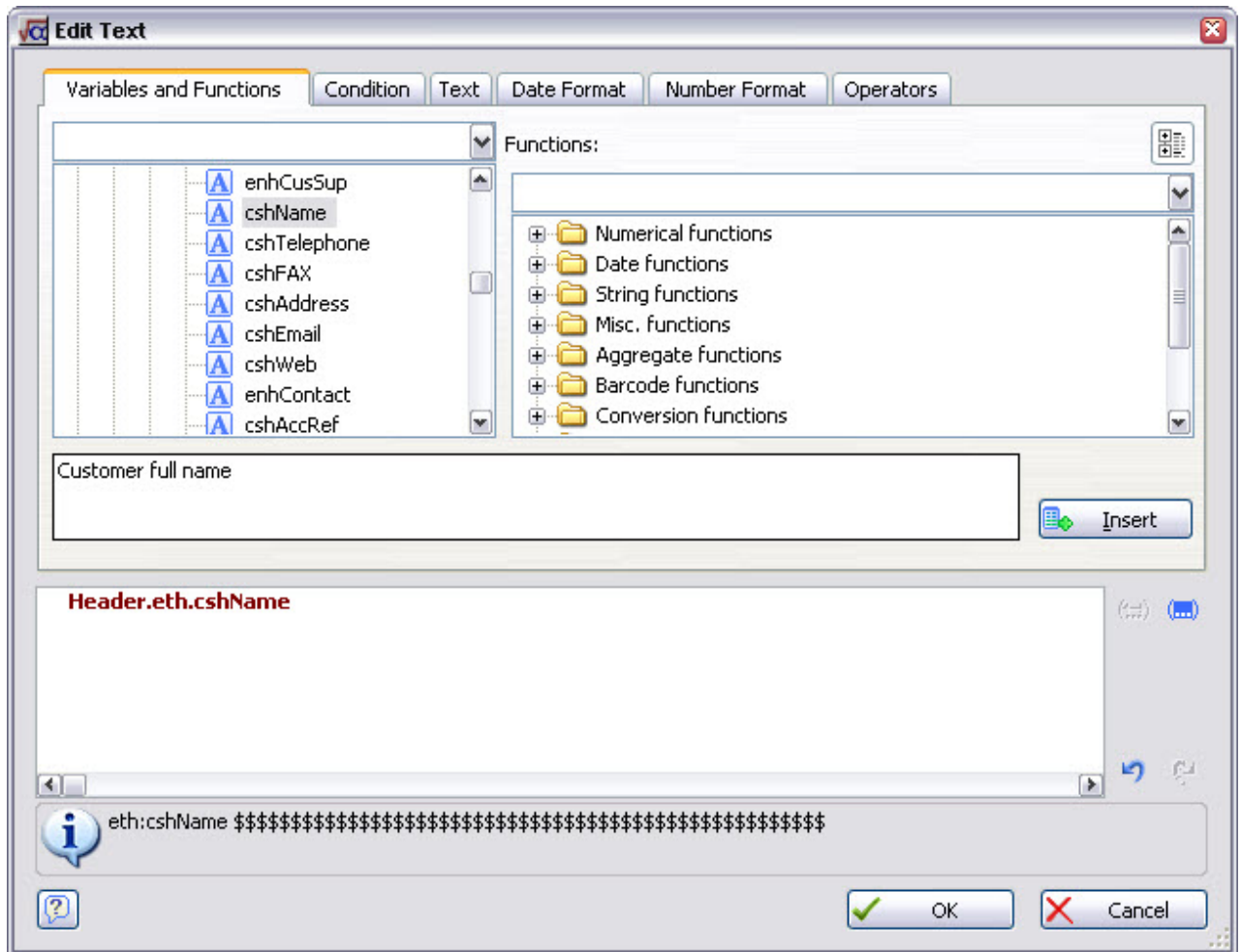
The symbol to the left of each variable name represents the type of information that the variable comprises, as shown below:

-  Formatted text - RTF
-  Plain text
-  Logical (i.e. only has yes/true or no/false values)
-  Number

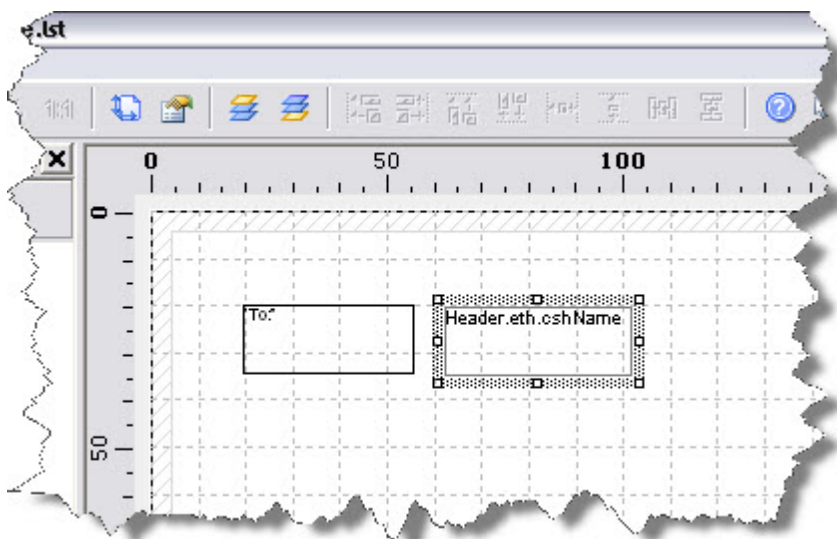
If you are familiar with spreadsheet or database programs, you might expect date information to be a fourth type. However, Match-IT dates are all passed to *List & Label* as text; this means that you cannot use *List & Label*'s date formatting functions to format dates passed from Match-IT. (However, you can use *List & Label* functions to take text apart and put it back together again in a different order – see Use of advanced features.)

The first three letters of each variable name is Match-IT's internal code for the data file holding the information. The remainder is Match-IT's internal name for the variable itself. You will be able to recognise many of these names: for example, `enhEnquiry` (which we can see is a number) is the unique number Match-IT assigns automatically to each of your enquiries; `enhSource` (which we see is text) is the enquiry source which appears on the `Addr/Notes` tab of Match-IT's enquiry form. You will also notice that when a variable is highlighted, a brief description is shown in the area below the variable list. If there are any names that you are unable to recognise, a more detailed list is provided in the reference section of the on-line help.

Scroll down the list of variables until you find `cshName` which is the customer's full name. Click on `cshName` and press the **Insert** button. As with the fixed text we entered before, you will see that it has been placed in the box at the bottom of the form. The brown colour indicates that *List & Label* recognises it as a variable.



Press **OK**, increase the text size to 11 pt in the **Text Properties** form, and press the **OK** button again to close the form. Your design workspace should now look something like:

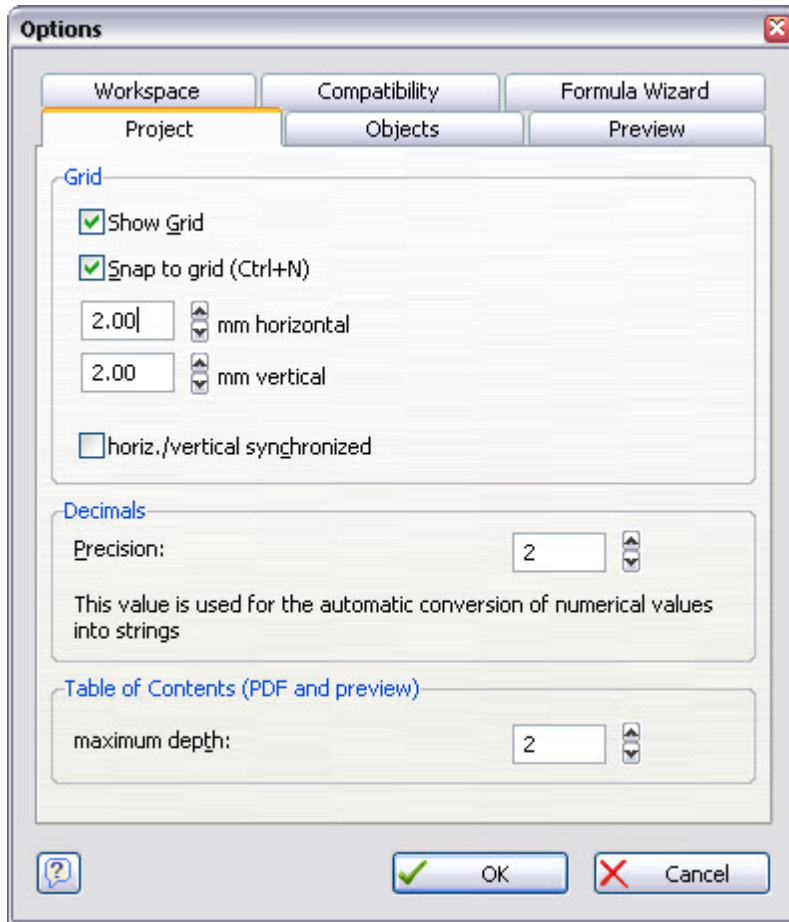


After all this work, you now have a paper that will print To: Joe Bloggs Limited if you were to produce a quote to a customer of that name.

You might find that Joe Bloggs Limited doesn't fit in the space you have allowed for it (as defined by the rectangle shown above); this would cause it to truncate (i.e. it might print as To: Joe Bloggs Limi). To prevent this, enlarge the box by clicking the re-sizing handle on the right-hand side of the rectangle, and

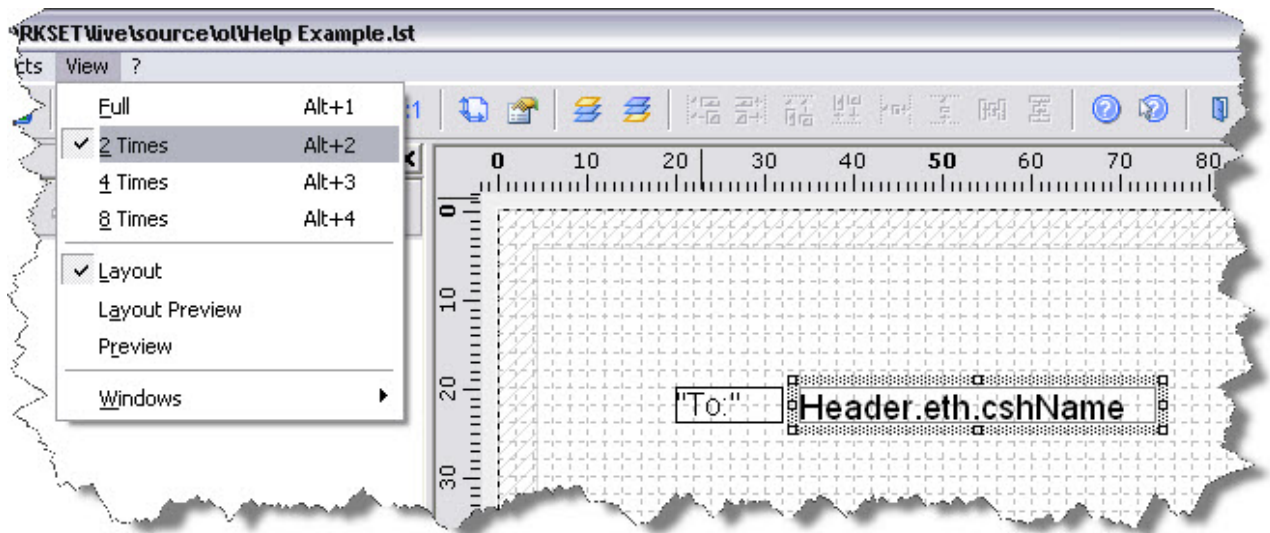
dragging to the right.

You are also likely to find it difficult to exactly line up the `TO:` with the customer name; *List & Label* can help you with this. From the **Project** menu, select **Options...** to display this form:



Click the **Snap to Grid** check box to enter a tick, make the grid a suitable size as shown above, and press **OK**. You will now find that when you re-size any item in your paper it jumps to the nearest grid position; this will help you line up the various elements of your paper.

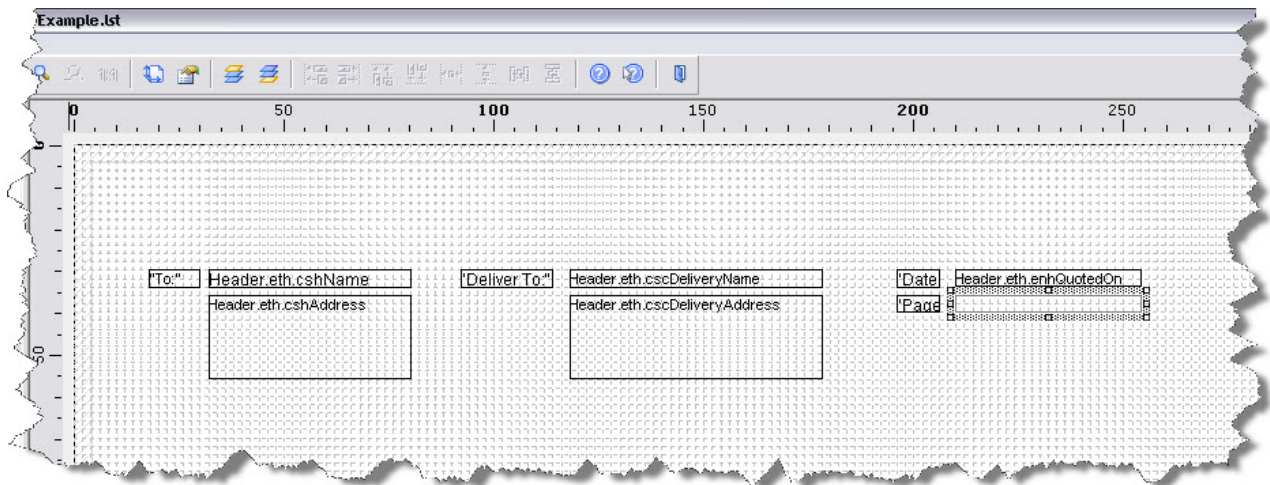
If the elements on your paper look rather small, you can view them at a larger scale by pressing the **View** menu, and selecting 2 Times, 4 Times or 8 Times magnification. Note that this does not change the paper itself – you are merely looking at it through a magnifying glass. This is similar to the Zoom facility in many word processors.



Creating the rest of the header section of our quote paper is just a matter of continuing to add fixed text and variables in this way.

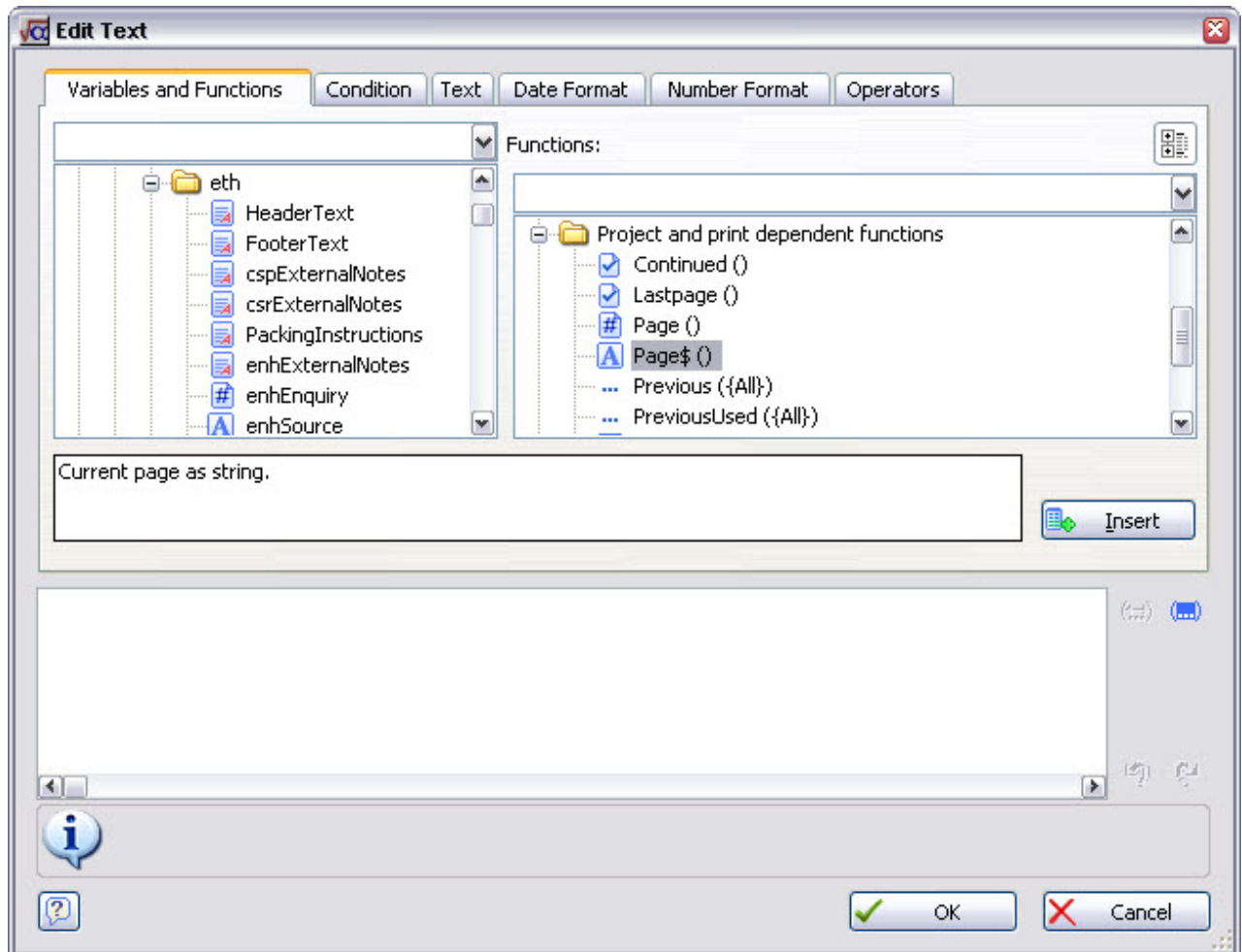
In the illustration below, the customer’s address has been added below the name. Because addresses contain several lines of text, the rectangle defining its position has been made deep enough to show all these lines. If you find that some of your customer address lines are not appearing in your printed documents, you can increase the space allocated by dragging the resizing handles as described above.

Match-IT allows a separate delivery name and address to be specified for the goods being quoted for, and these have also been added as shown:



In this example, we have come to the point where we want to print a page number in case the quotations run to more than one page. Page numbers on the printed document are not governed by Match-IT – there is no variable for this. Instead, *List & Label* can itself generate page numbers, and you can place them in your paper by means of a *function*.

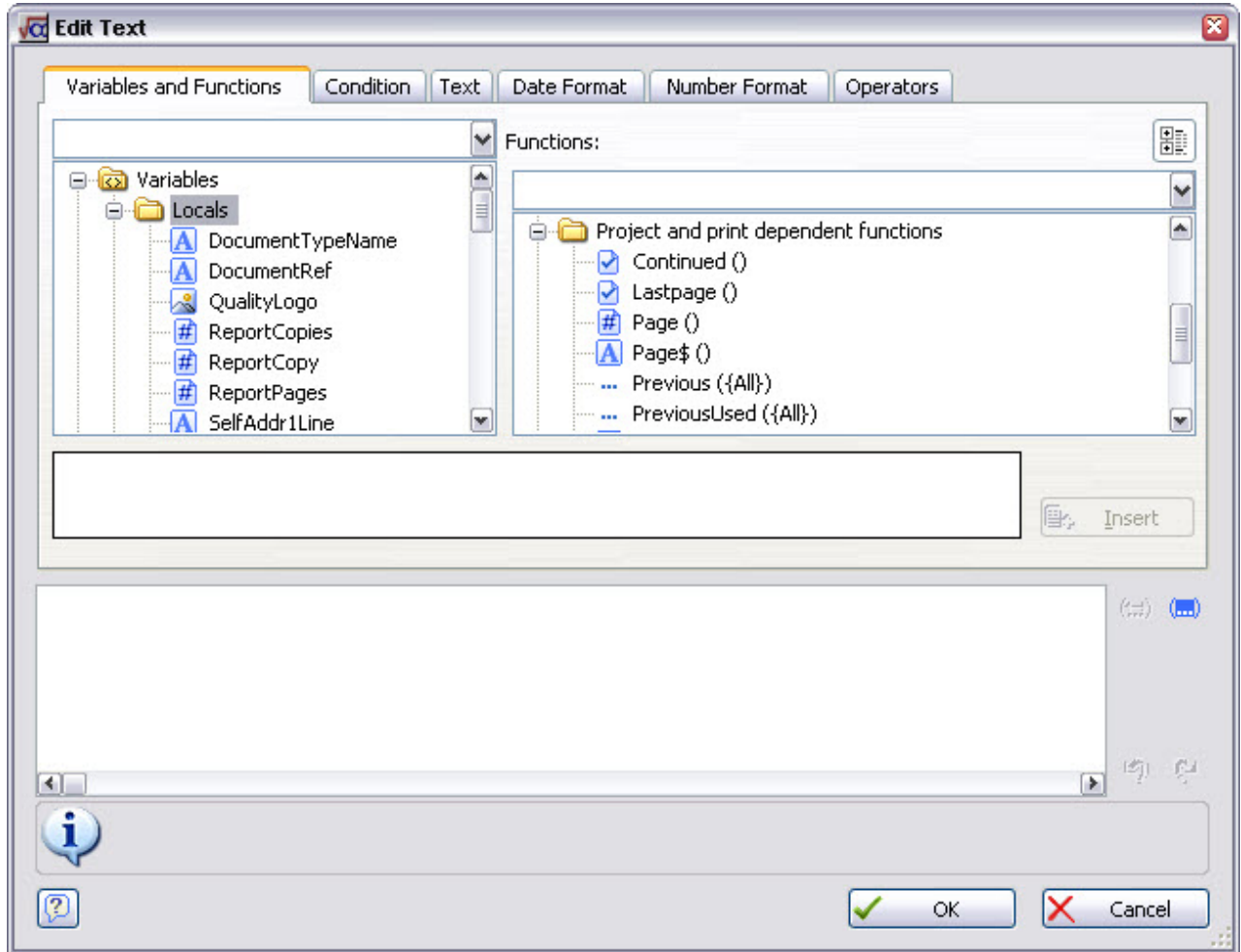
Proceed as if you were going to place a variable in your paper, but when you get to the **Edit Text** screen, press the **+** sign to the left of the **Project and Print dependent functions** on the right hand side in the box labelled **Functions:**. Click on the function called `Page$()` as shown in the illustration below. *List & Label* indicates to you the purpose of the function that you have selected in the box below the function list.



Press **Insert**, then **OK** and **OK** again to return to the design workspace; the page number will now be printed on your quotations. In a similar way, you might like to use the `TotalPages$()` function to print the total pages of the document along with the current page (e.g. "Page 1 of 2").

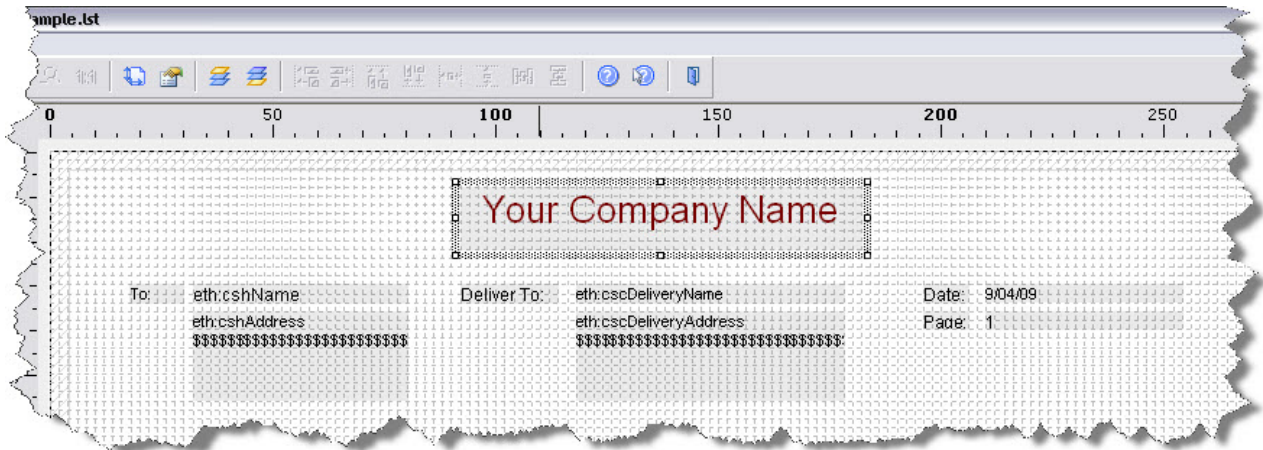
6 How do I put my company information into my paper?

Proceed as if you were going to place a variable in your paper, but when you get to the **Edit Text** screen, press the **+** sign to the left of the **Locals** category to reveal a list of company information, as shown below:



These variables are taken from the *Reports Layout* defaults (class *o1*) in your Match-IT system, so if you change any of these default values you will also change all the printed documents in which they appear. You will find that the **Locals** variables are available for use in all types of paper, not just the quotation category we are working through in this example.

To insert your company name on your quotations, select **SelfName** from the list. Press **Insert**, then **OK**. In the **Text Properties** form, increase the text size to 20 pt and select your corporate colour; then press **OK** again to return to the design workspace. If you click on the preview tab, you will see your own company name in a similar way to the illustration below:



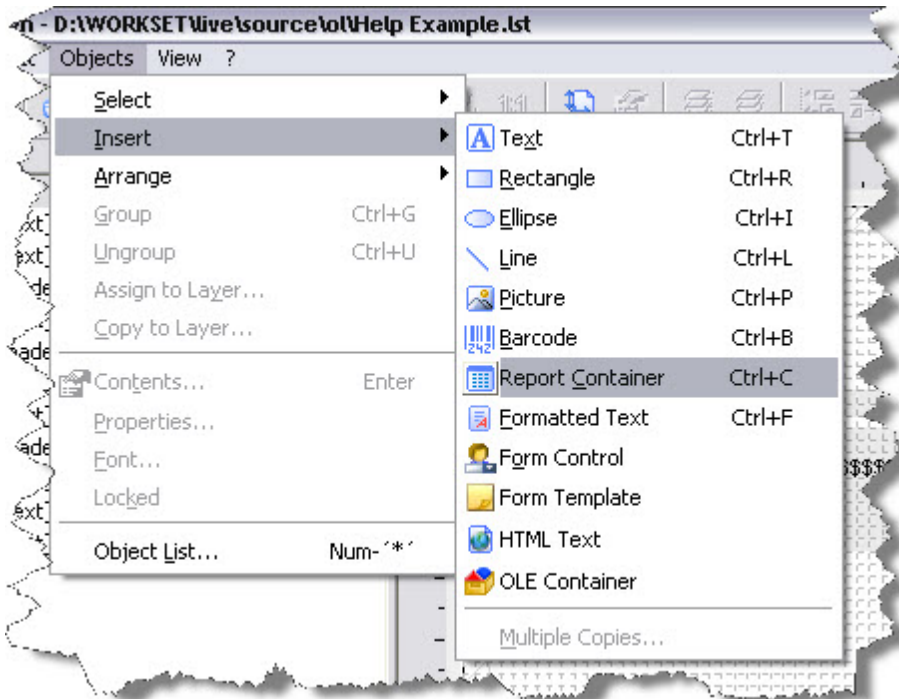
Note that you can change the colour of any item in your paper, but of course this will only be effective if you print the final document on a colour printer, or send it electronically.

Continue to add other company information to your paper as you wish: your address, telephone, fax and e-mail for example.

7 How do I put detail information into my paper?

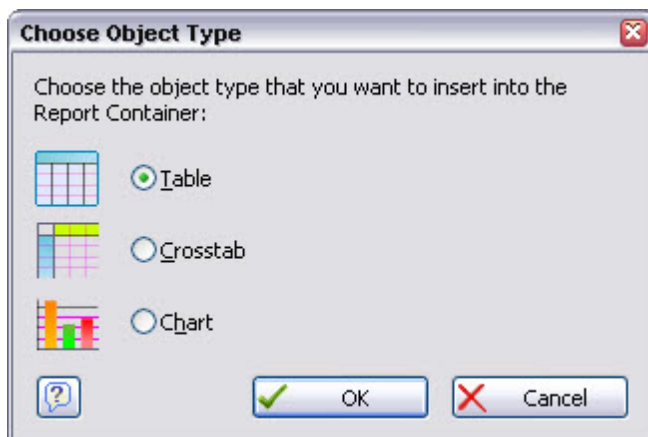
The detail lines of your papers will normally comprise the parts that you are quoting, selling, making, buying, dispatching or invoicing. You enter these into your paper by means of a table, which is a type of *report container* in *List & Label* terminology.

From the **Objects** menu, select **Insert** and then **Report Container** as shown below:

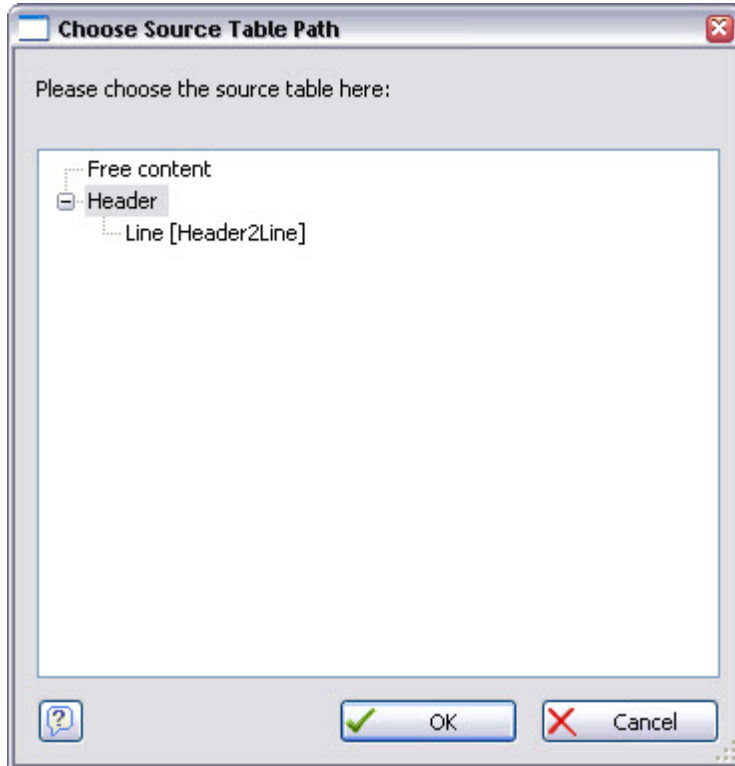


Using your mouse, define the position and size for the table area by dragging the cursor from one corner of an imaginary 'box' to the diagonally opposite corner. Make the box the whole width of your page below your header information, but don't worry exactly where – it can be moved and re-sized later.

When you release the left mouse button, a dialog will appear asking you which type of container you want. Only the **Table** type is usable in Match-IT, so make sure you select the table option as shown below:



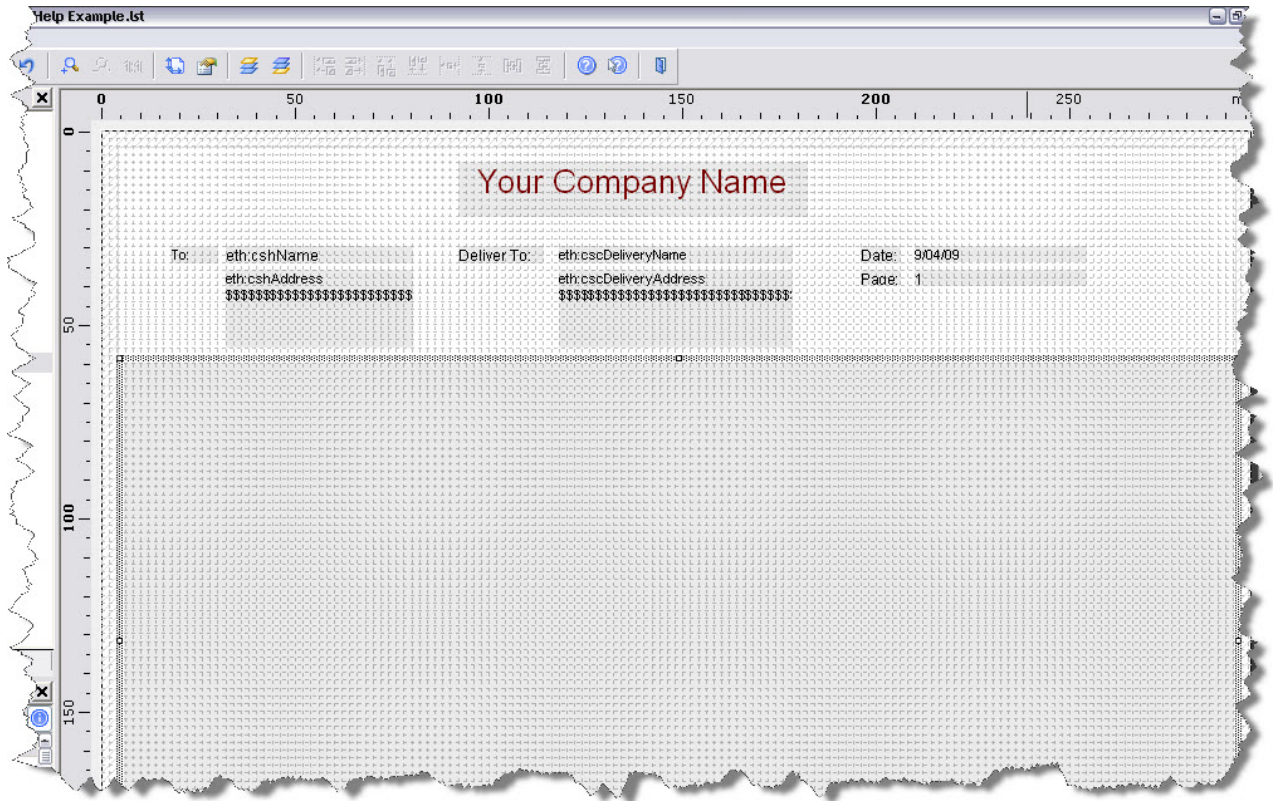
Press **OK**. Next *List & Label* will ask you where the information for the table is to come from. A form like the one below will be shown:



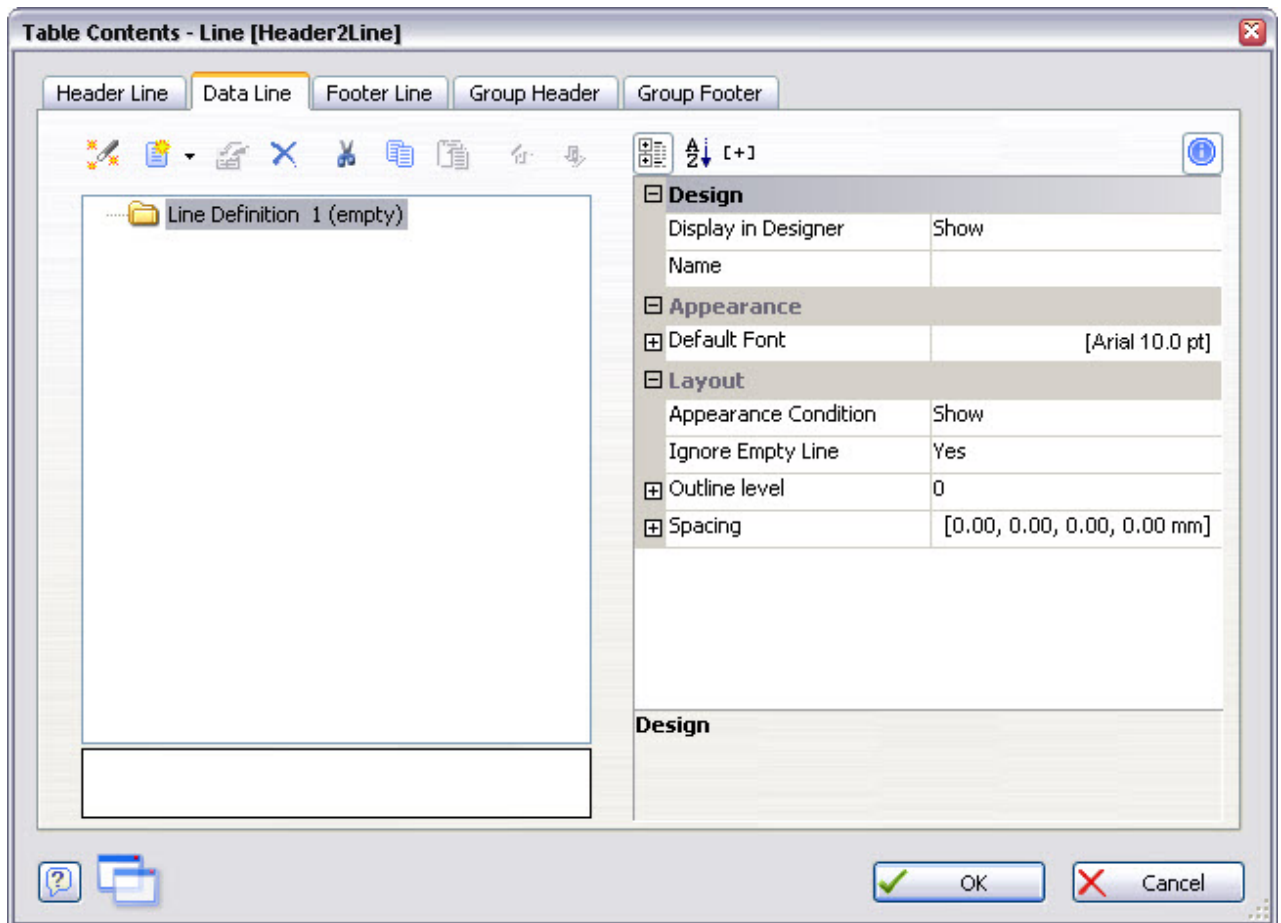
What you see in this form will depend on the type of document you are creating. It shows a view of all the information available and how they are related. In the quote example you will see a `Header` table and below it a `Line` table. Notice the `Line` table is indented, this indicates it is a 'child' of the `Header` table. This means for every `Header` there can be any number (including none) of attached `Lines`, i.e. for every quote there can be any number of quote lines - just as you would expect. A single level like this is the simplest case, you will find other documents with much more complex structures, in Match-IT the most complex is the works order, containing 18 tables.

Select the `Line [Header2Line]` entry and press **OK**.

Next, a form will be shown to allow you to pre-select fields. This is a tool that is described in more detail in the *List & Label* manual. Will not use it here, press **OK** then **OK** again. You should now see an outline of your table similar to the one below:




Double-click anywhere inside the table area to open the **Table Contents** form, and select the tab labelled **Data Line** as shown below:

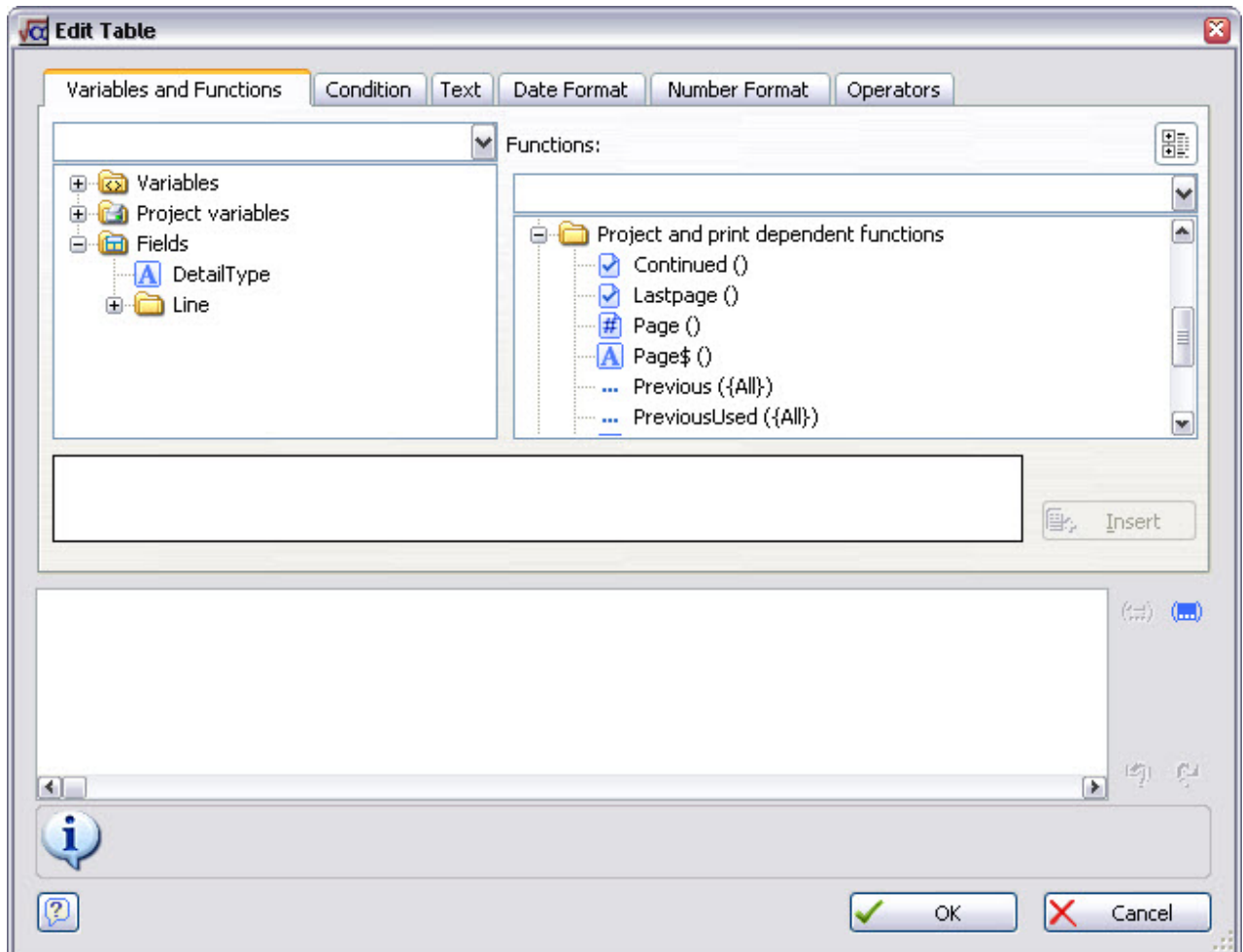


This is where you specify the columns of your detail lines, and when creating your own papers you will need to decide on these before you go any further.

In this example, let's assume we want to have 7 columns of information for the items we are quoting to our customers, as follows:

- Line Item Reference
- Our Part Number
- Customer's Part Number
- Description
- Quantity
- Quoted Price
- Quoted Delivery Date

To specify these columns, click the *append column* icon: . This opens the **Edit Table** form as shown below:



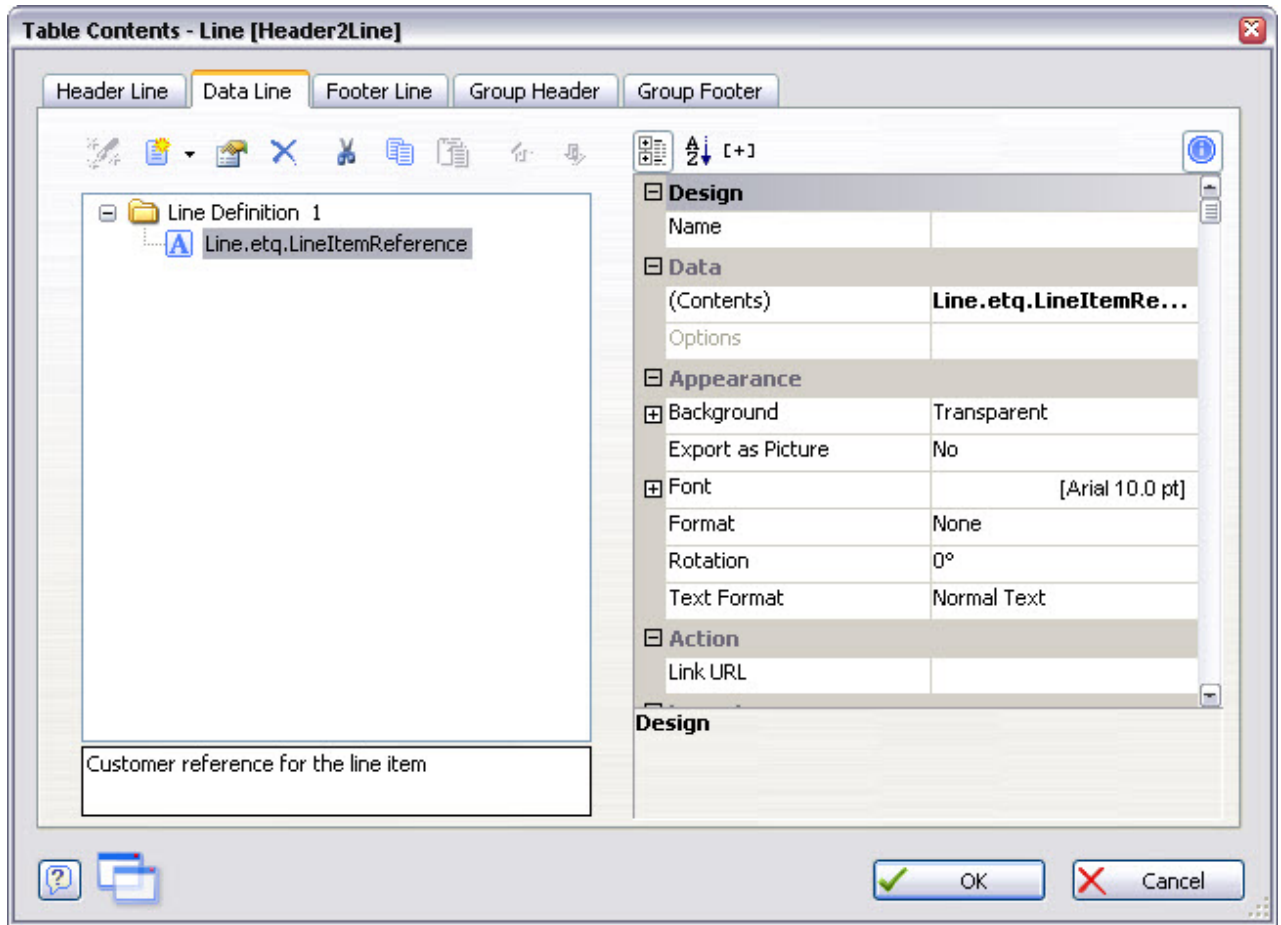
You should immediately recognise this form as being almost identical to the **Edit Text** form that we used earlier for our header text and variables, and indeed it operates in the same way. The difference is that we now have a group of **Fields** in the **Variables and Functions** section, as shown above.

Most of the information we require for the detail part of our paper is contained in the **Fields** group, so press the **+** symbol to the left of the word **Fields**, and then **Line** to display the Match-IT files available for use in quotation lines. `etq` is Match-IT's quote line file, and you will also notice that a **Qualifiers** group may also be present; all qualifiers relating to your products can be included in your printed documents by adding them to your papers. The **Qualifiers** section will only appear if you have created appropriate qualifiers. See *Setting up qualifiers* for how to do that.

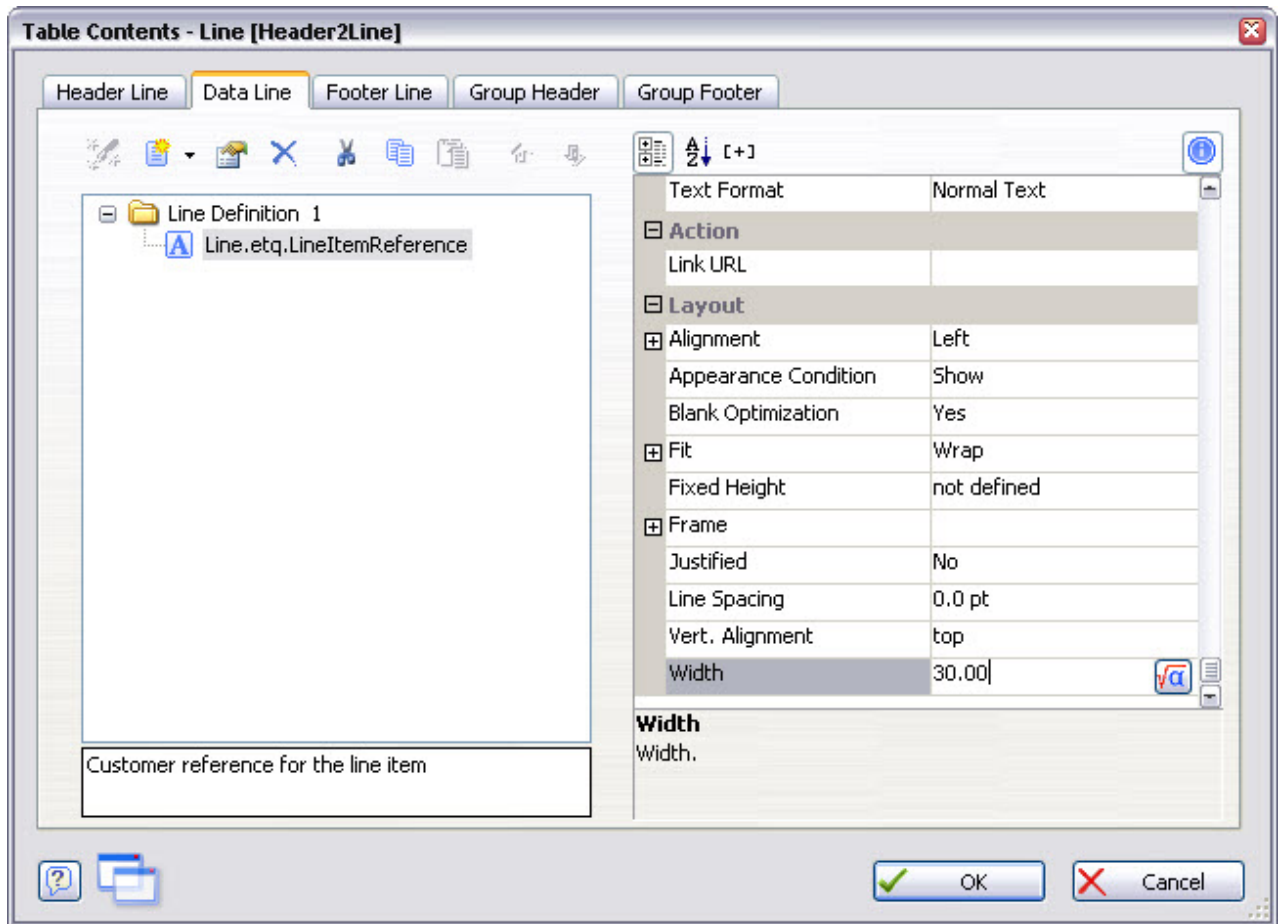
Scroll down the list of fields until you find `LineItemReference`. This is to be the first (i.e. left-hand) column


in our details section, so select it and press the **Insert** button, then **OK** to return to the **Table Contents** form.

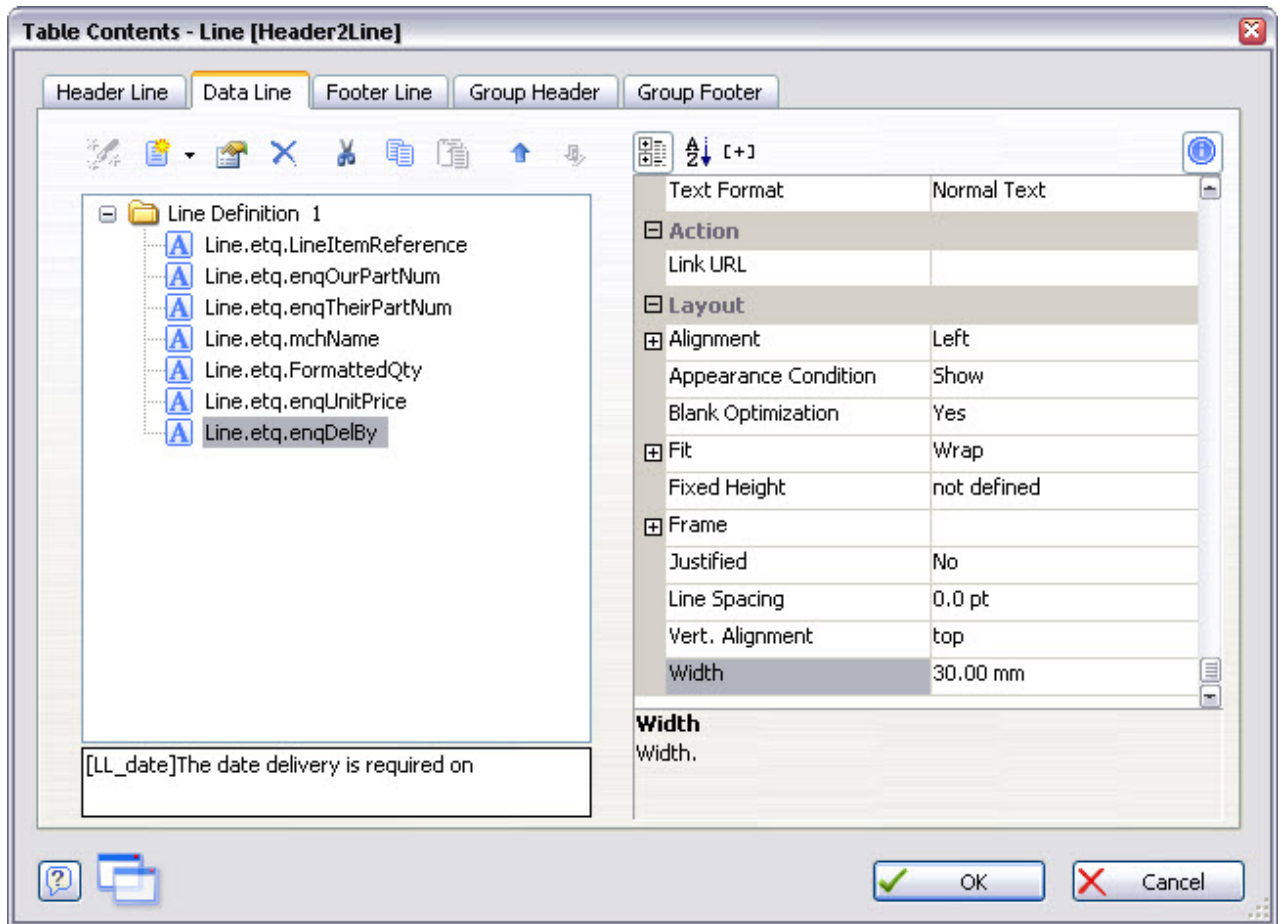
The **Table Contents** form should now appear as shown below:



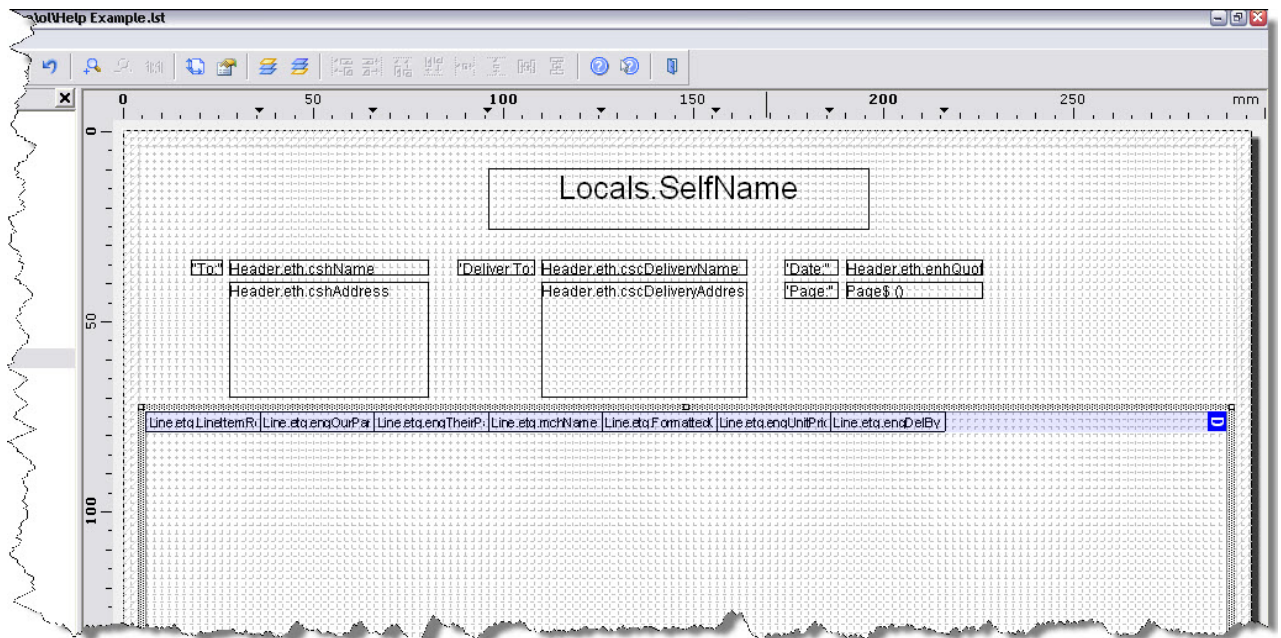
Notice that a number of properties are shown in the area on the right hand side of the form; these enable you to format the column and its contents (i.e. the `LineItemReference`). If you select (click on) each of these properties in turn, an appropriate editing facility will be displayed in the right hand half of the property which enables you to change the value of the property. In the illustration shown below, the width of the column has initially been set to 30mm, but you can change this using the control provided.



By clicking the *append column* icon: , add in turn the remaining 6 columns in the same way. If you've managed to find the right variables from the list, your Table Contents form should then look as shown below:



Press **OK** to close the form, your design workspace should look as shown below:

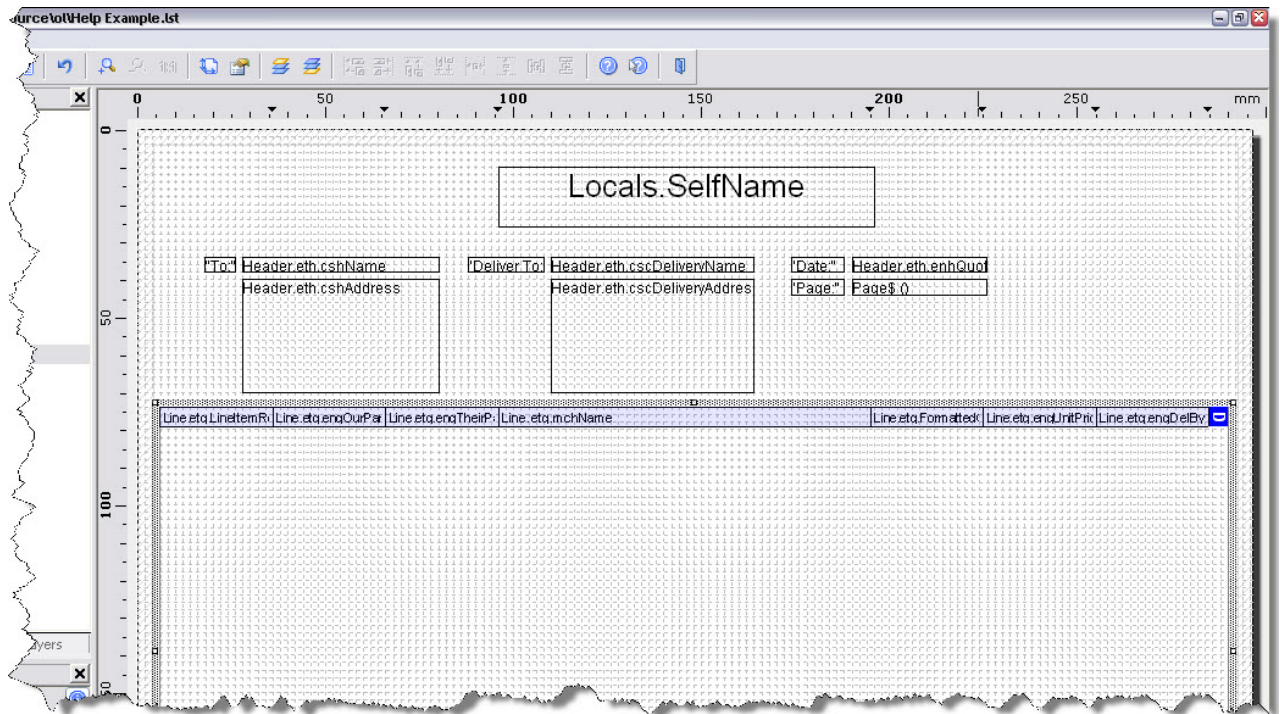


You will notice that at the moment our 7 columns do not take up the full width of the table we have defined. This is just as well, because some columns may need more than the 30mm width that *List & Label* has initially allocated. For example, the *Description* column *mchName* will almost certainly need more space.

There are two ways to adjust the width of each of your columns: you can activate the **Data Line** tab on the **Table Contents** form, select the column you want to alter and specify its width in millimetres.

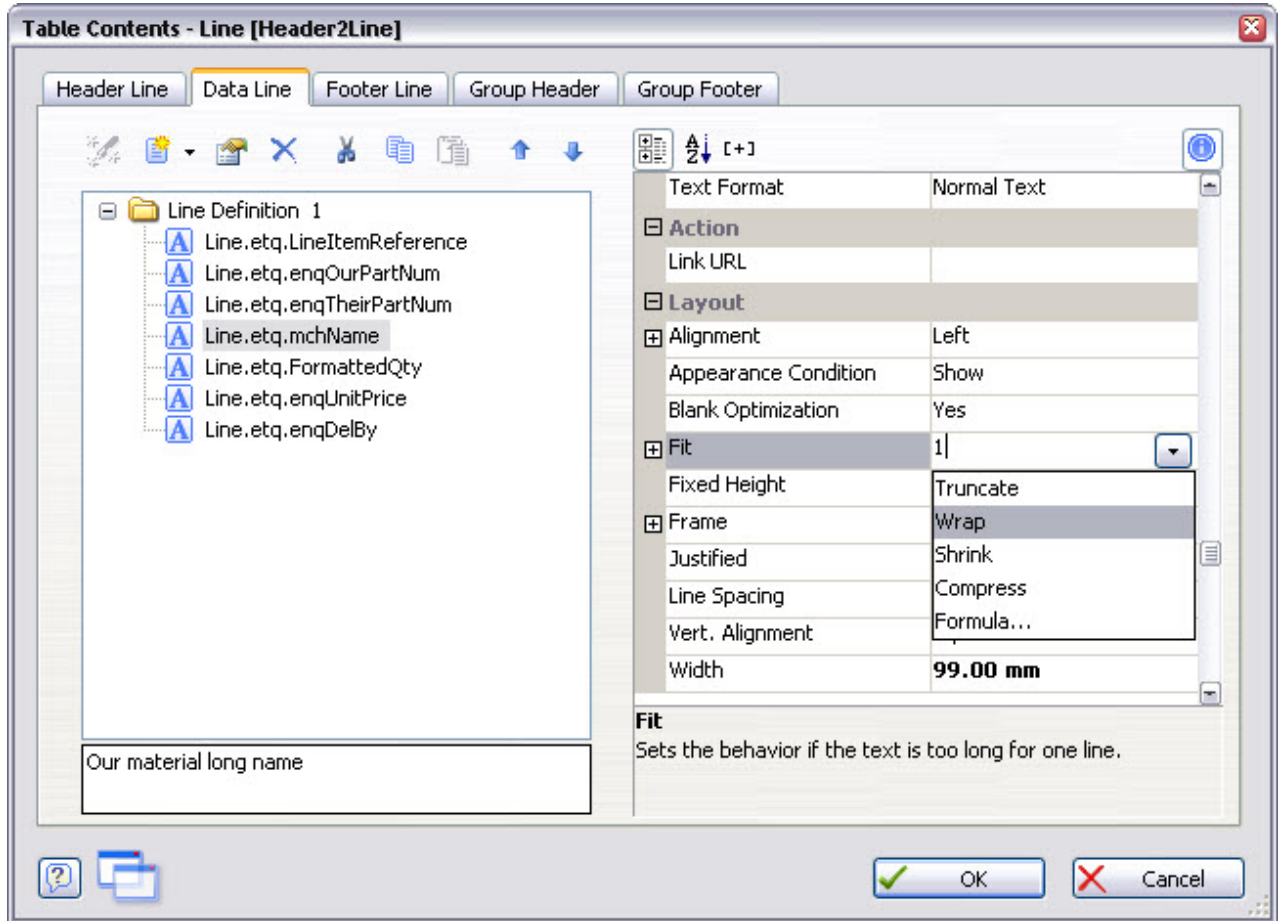
Alternatively, you can do it interactively by placing your mouse cursor over the column boundaries and dragging them to the positions you require. As you move the mouse over a column boundary, you will see the cursor changes to the usual *Windows*™ column re-size icon, just drag that boundary to where you want it.

When you have increased the width of the *Description* column, you should have something like this:

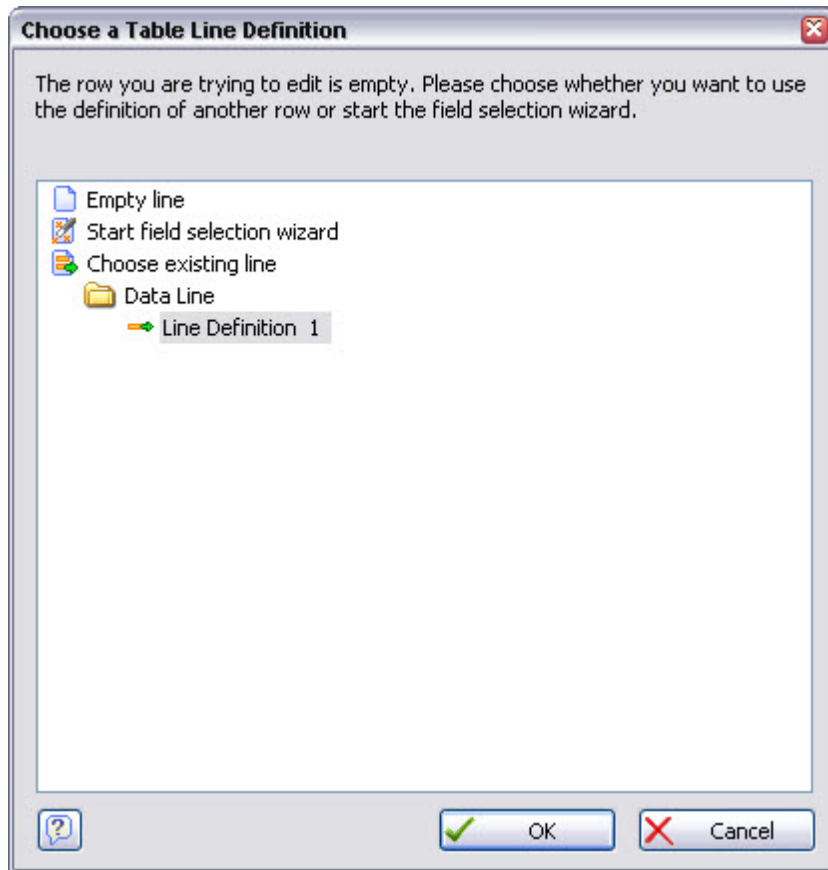


When you are creating your own papers, you will probably have to use a certain amount of trial and error to optimise your column widths: too wide and you are wasting precious page width; too narrow and the contents of your columns will be truncated.

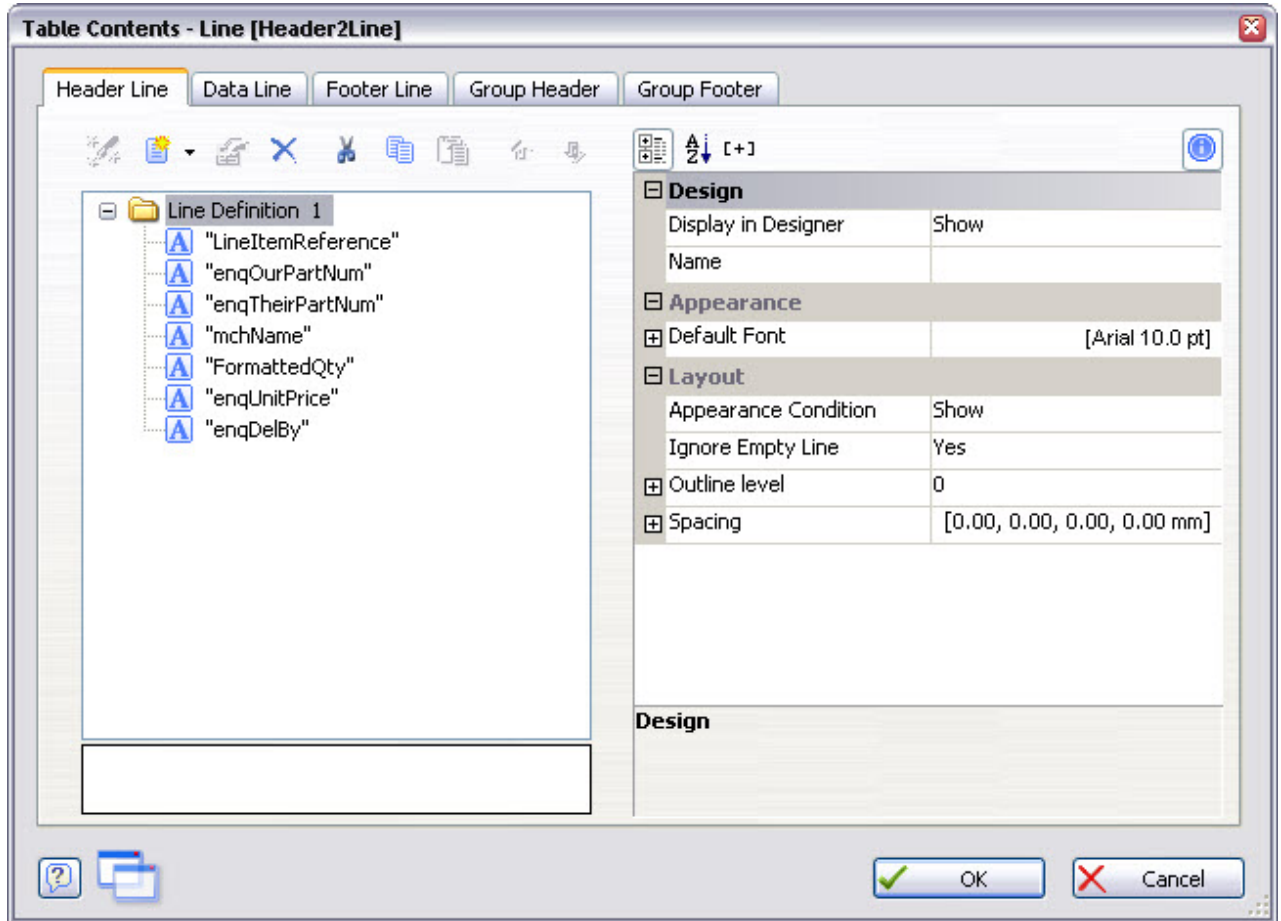
If it proves very difficult to prevent the contents of your columns being truncated, you can tell *List & Label* to wrap onto a second (and subsequent) line. To do this, select the column you want to be wrapped, and change the **Fit** property from **Truncate** to **Wrap** as shown in the illustration below:



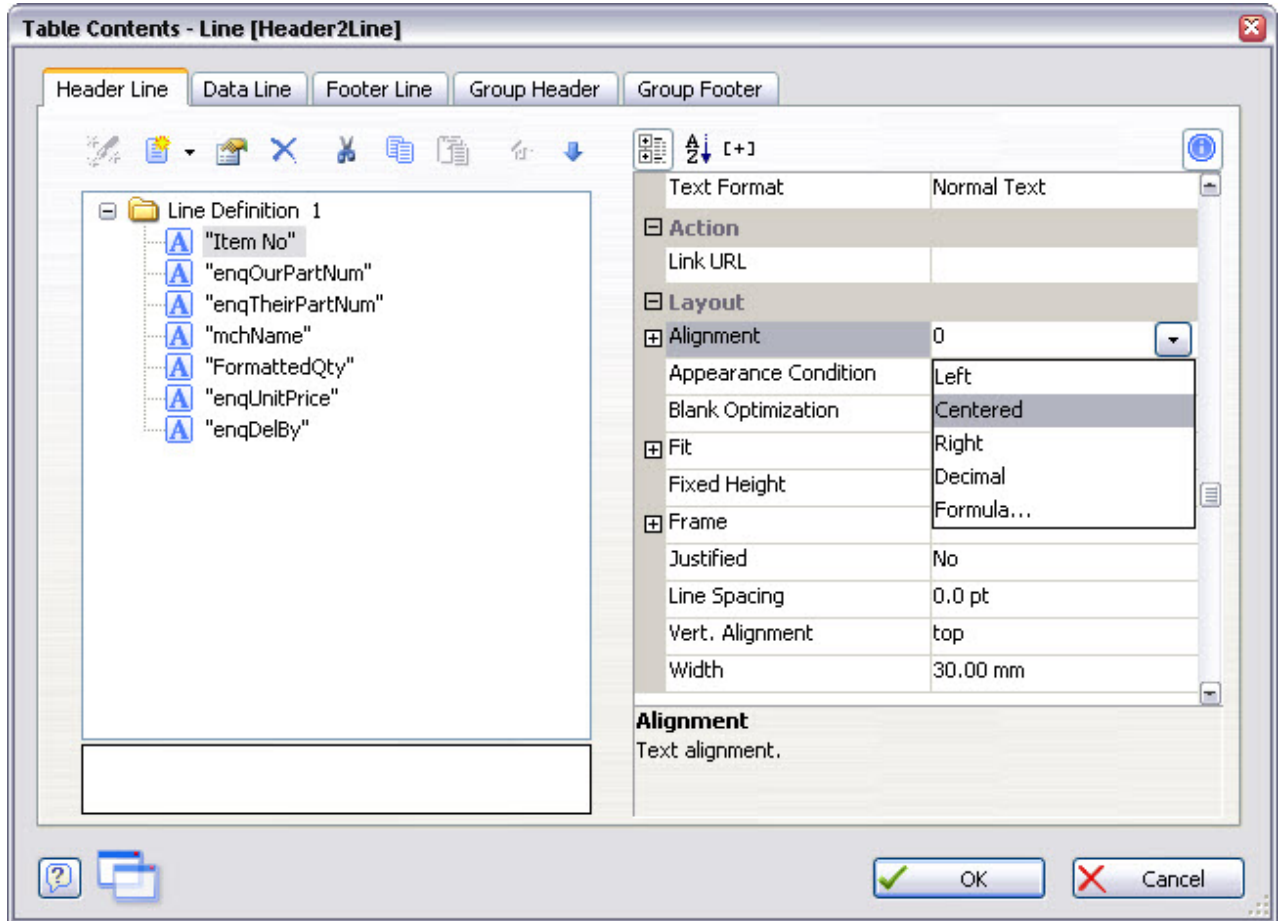
We now need to add some headings to the columns of detail lines so that our customers know exactly what each column is. To do this, select the **Header Line** tab on the **Table Contents** form. You will be presented with this form:



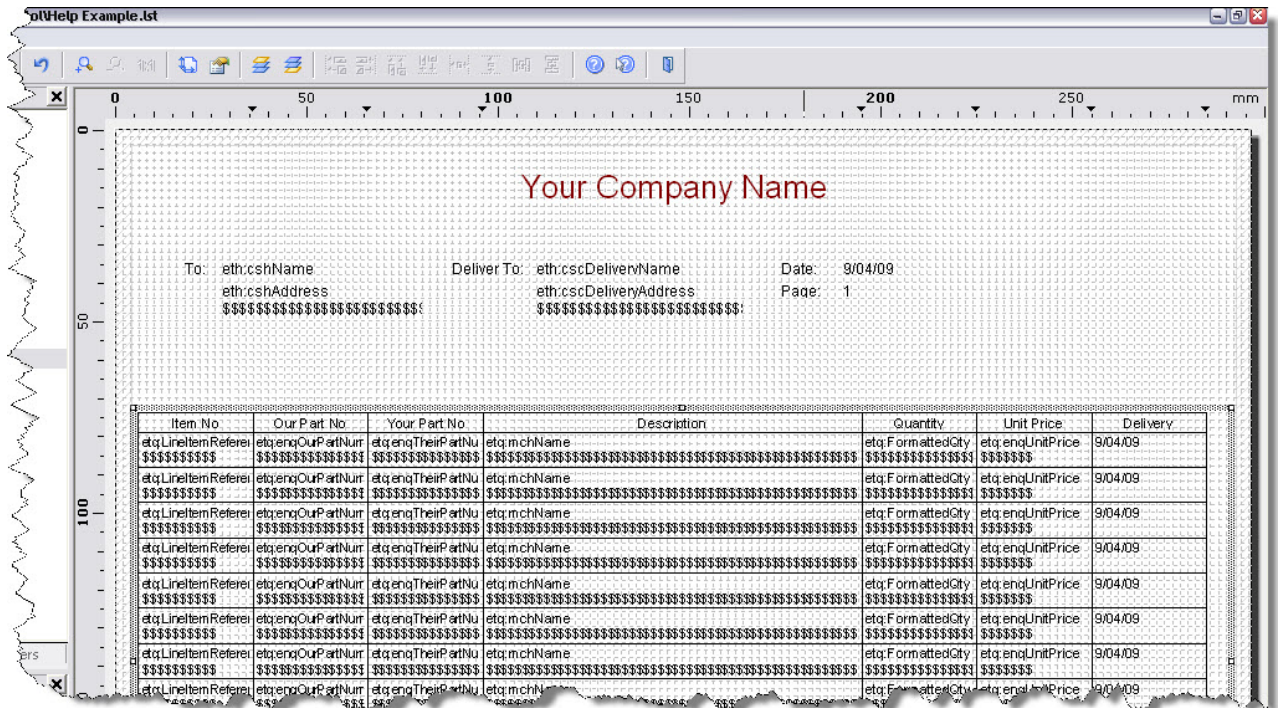
List & Label is asking you whether you want it to create column headings to match the details we have just specified. It's easiest if we do this, so select **Line Definition 1** and press **OK**. *List & Label* will then create headings with the same column widths as your detail lines, as shown in the illustration below:



You will notice that *List & Label* has used Match-IT's field names for the column heading names, but we can change these into something more meaningful. Double-click on each heading name in turn and edit the text to something of your choice, as shown in the illustration below. You may also want to centre-align the column headings as shown.

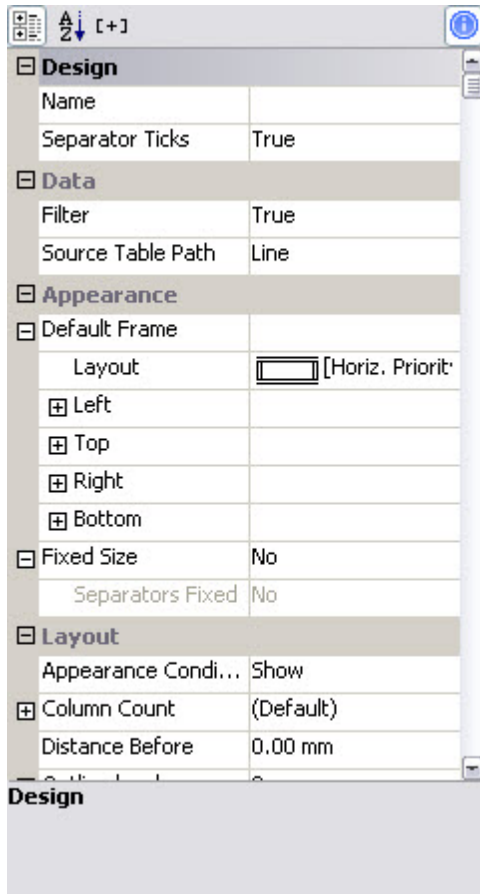



When you have given all the column headings meaningful names, press **OK** to return to the design workspace and select the **Preview** tab. Your paper should look similar to that shown below:

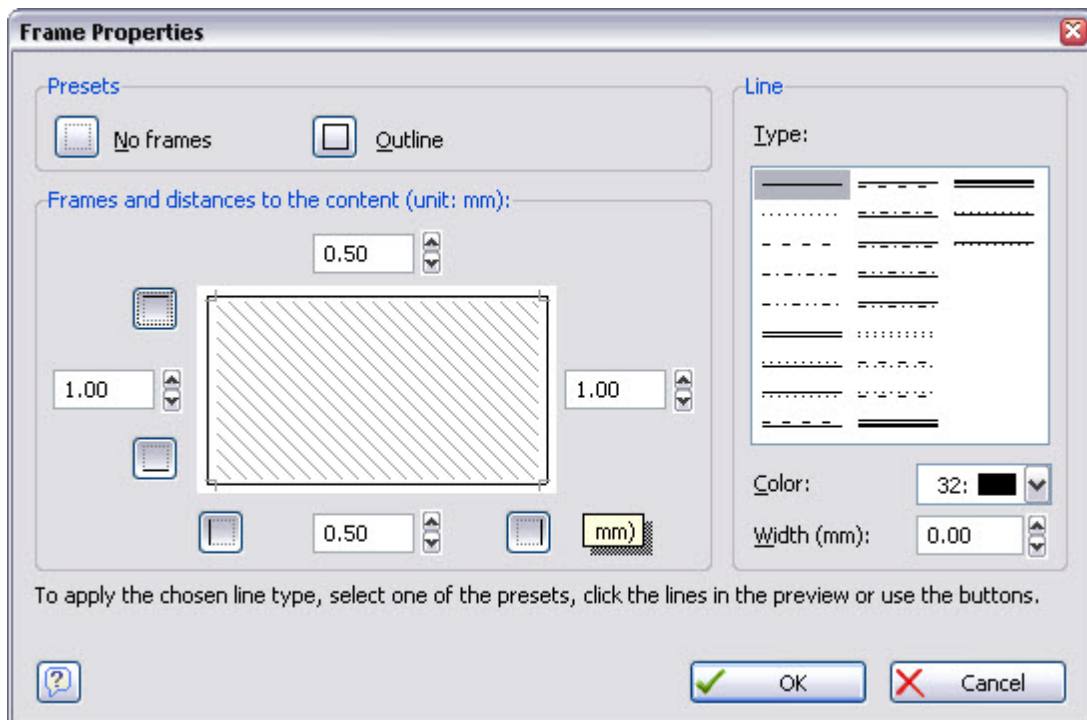



You will notice that the columns are all separated by vertical borders, and also that the items on your quotation are separated by horizontal lines. However, you can control whether these borders appear.

To do this, right-click in the table area and select **Properties** from the menu shown. A list of properties for the table will be shown to the lower left of the design area, like this:





Scroll down and select the Default Frame property, then press the  button that appears. The form shown below appears:

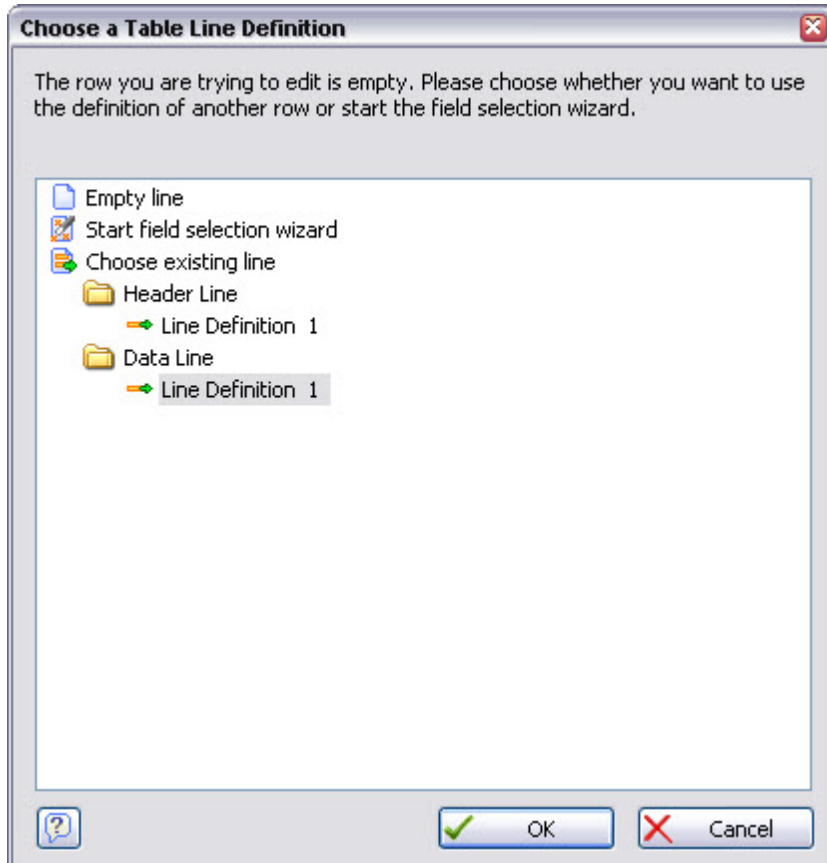


To remove the border lines, click on the line you want to remove, it disappears. Click again, it comes back. Press **OK** when you are done. Note: You are editing the default frame for all lines in the table, so it will affect the header lines too (i.e. the column titles). You can put them back on those by editing the frame for the individual column titles. To do that, double-click on one of the column titles so that the **Table Contents** form shows with your column title selected. Then select the **Frame** property, press the  button that appears and the same frame form as shown above will appear. But, this time only the column selected is being affected.

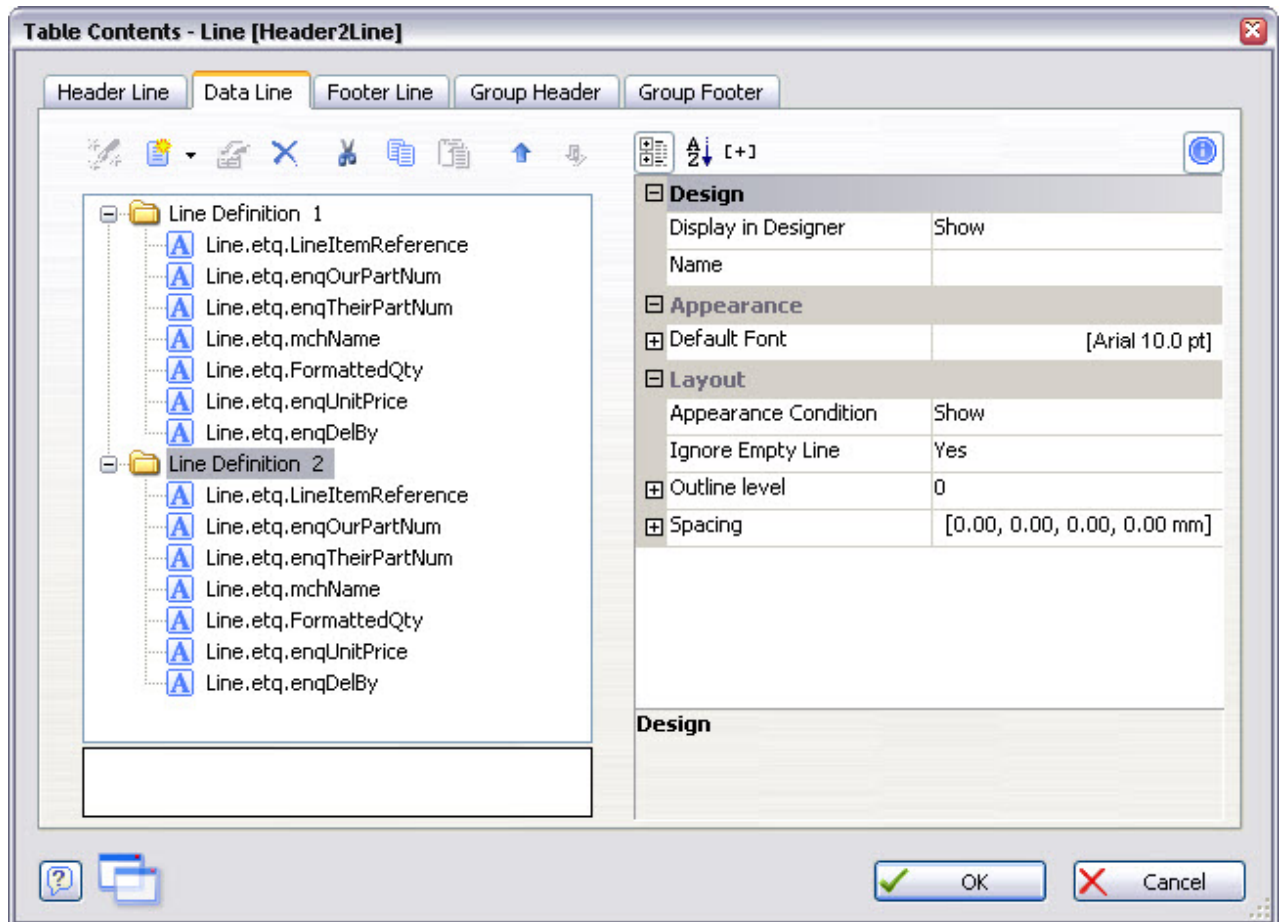
8 How do I add more data lines to my paper?

Despite your best efforts to optimise column widths, wrap text, etc. you may still find that you need to print more information in some of your business documents than there appears to be space for. If you had this problem on a manual system, you would probably solve it by putting more information into one or more of the existing columns underneath what is already there. This is also possible with *List & Label*.

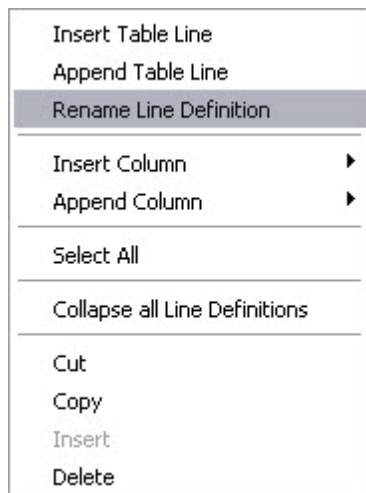
Double-click on the table to open the **Table Contents** form, select the **Data Line** tab, select the **Line Definition 1** folder and press the  icon. This will open a dialog to allow you to create another line, as shown below. Note: The  icon must be selected when the **Line Definition 1** folder icon is selected, otherwise you'll get the dialog to add another column to the existing line rather than that to add a whole new line.



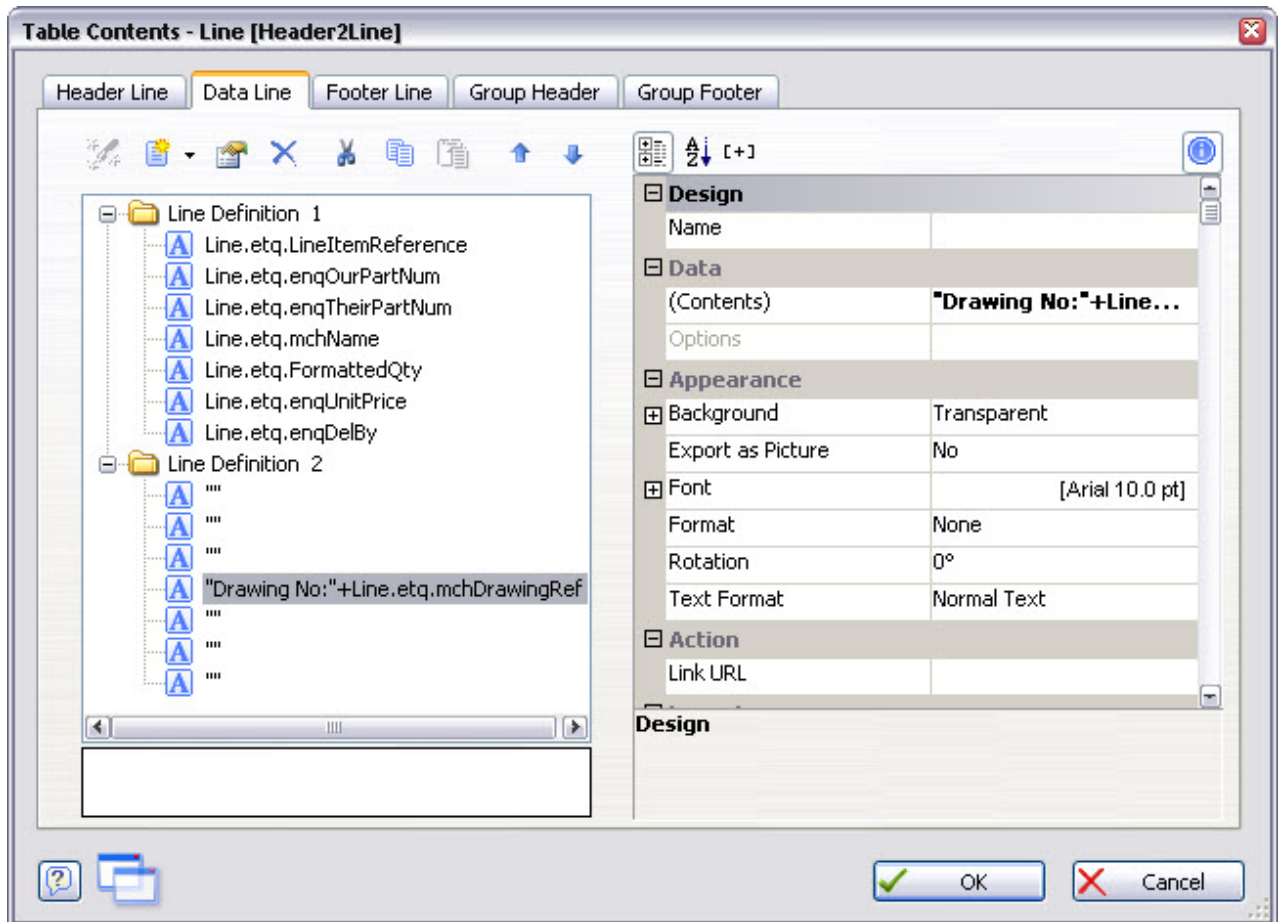
List & Label is asking you whether you want it to create a second data line to match the column headings or data line we have already entered. It's easiest if we do this, so press OK. *List & Label* will then create a second row of data which is identical to your first detail line, as shown in the illustration below:



List & Label will give your new line the name **Line Definition 2**, but you can rename these lines to anything that is meaningful to you. Right-click on the **Line Definition 2** line and select the **Rename Line Definition** item as shown below:

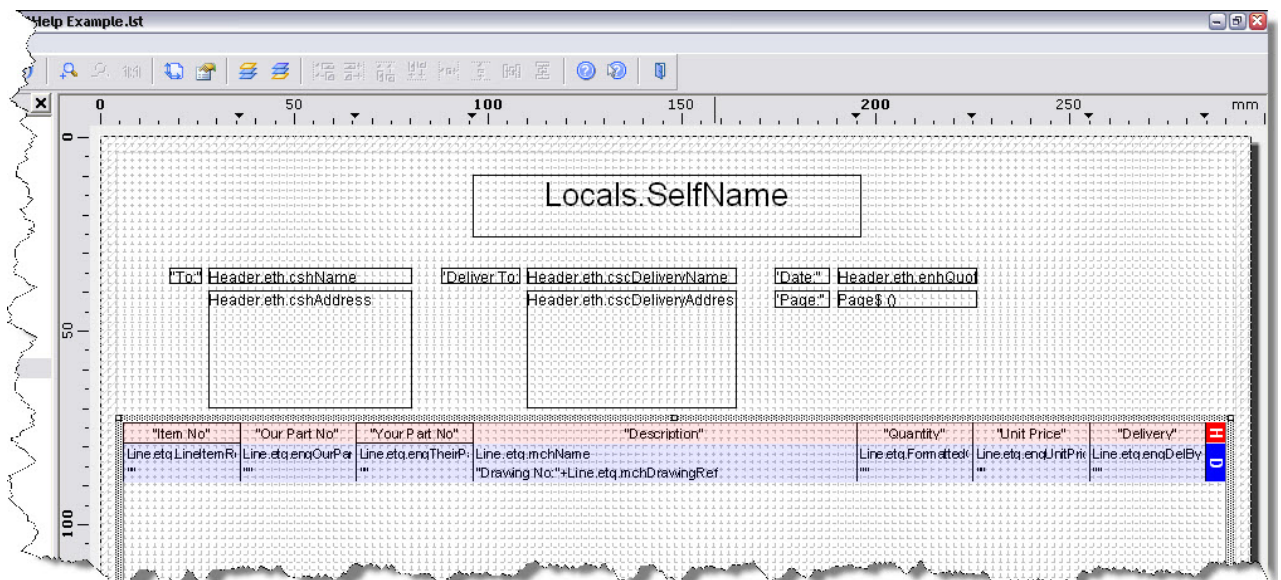


We now need to specify the information we require in this second line of data. In our example, only the **Description** column (which is the fourth one) is to have extra information. Double-click on each of the other columns in turn and replace what is there with blank text. Then double-click on column 4 and replace the contents with some text – **Drawing No:**, – a plus sign and then the field called **mchDrawingRef**. Press **OK** to return to the **Table Contents** form, which should now look as shown below:



A second line showing the drawing number will now be printed underneath the part name in the **Description** column of our quotations.

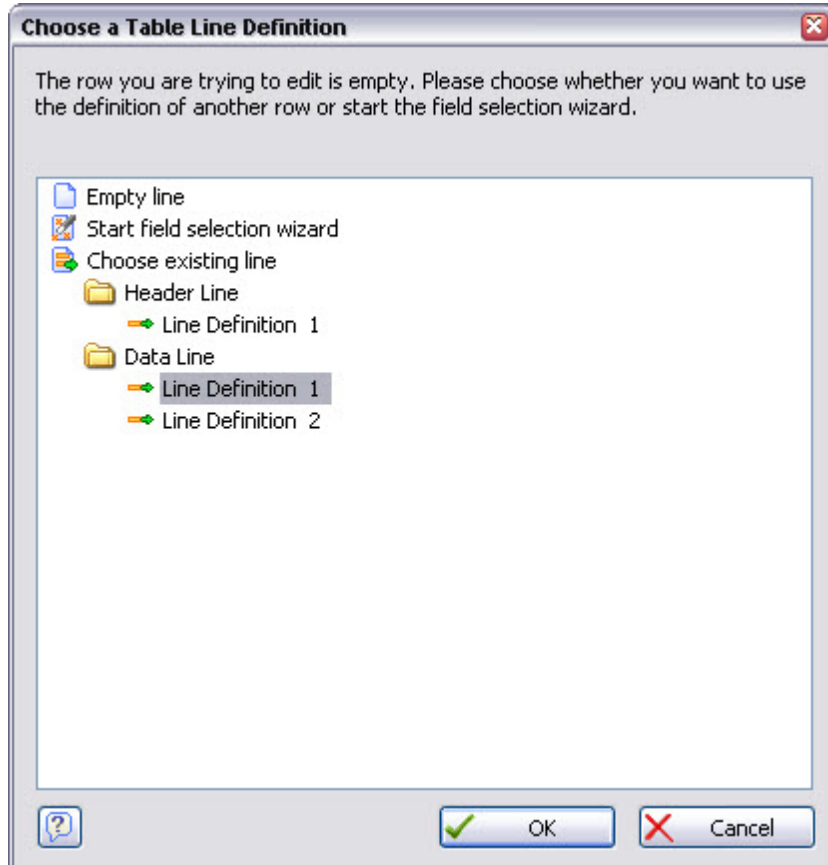
Press **OK** to return to the design workspace, which now appears as shown below:



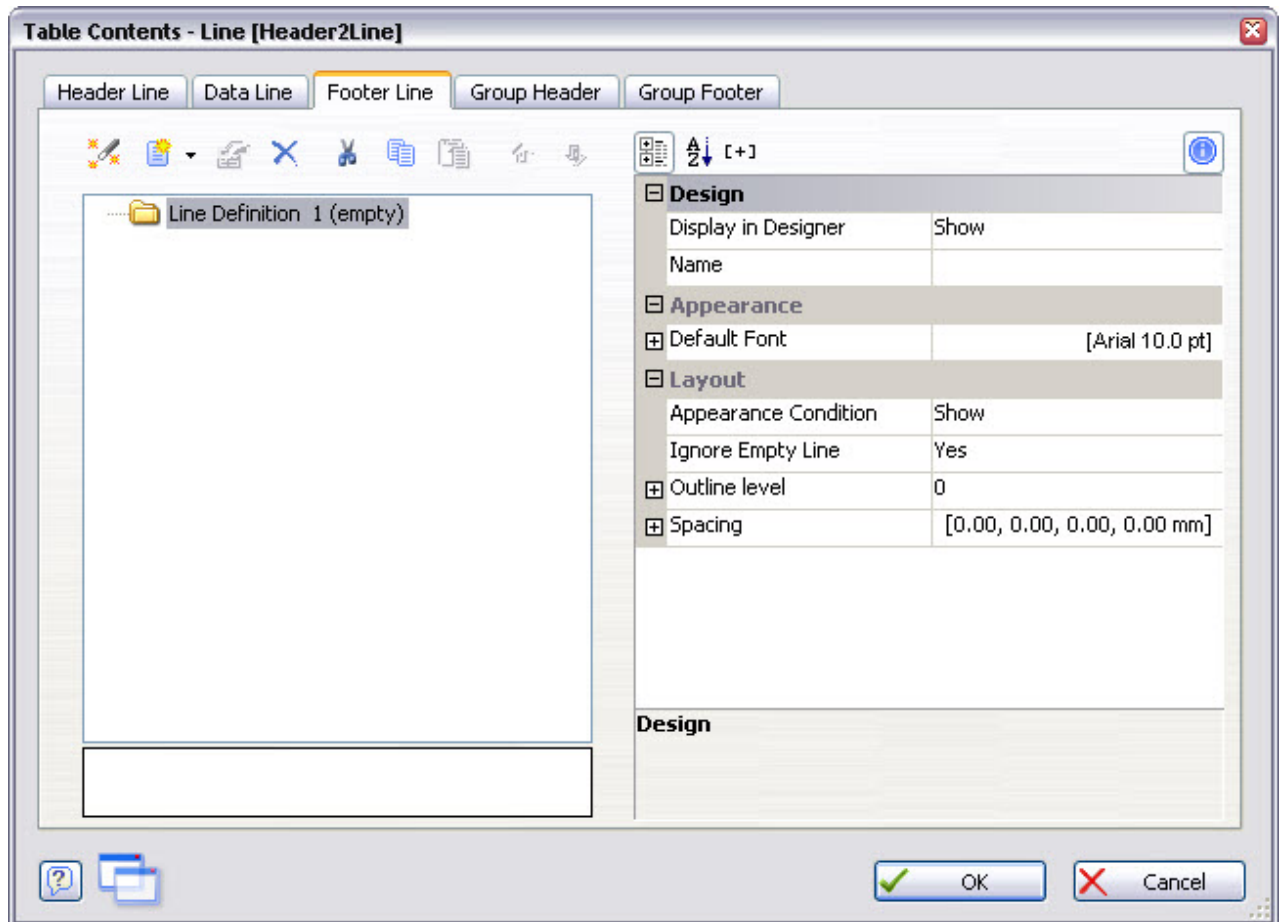
9 How do I put footer information into my paper?

Match-IT provides a notes field for recording any information about the enquiry as a whole, and you may wish to print this at the bottom of your quotation after the list of items being quoted. (Similar fields exist for each of your main business documents: sales orders, purchase orders, works orders, despatch notes, invoices, etc., and you may want to do the same thing with these documents.)

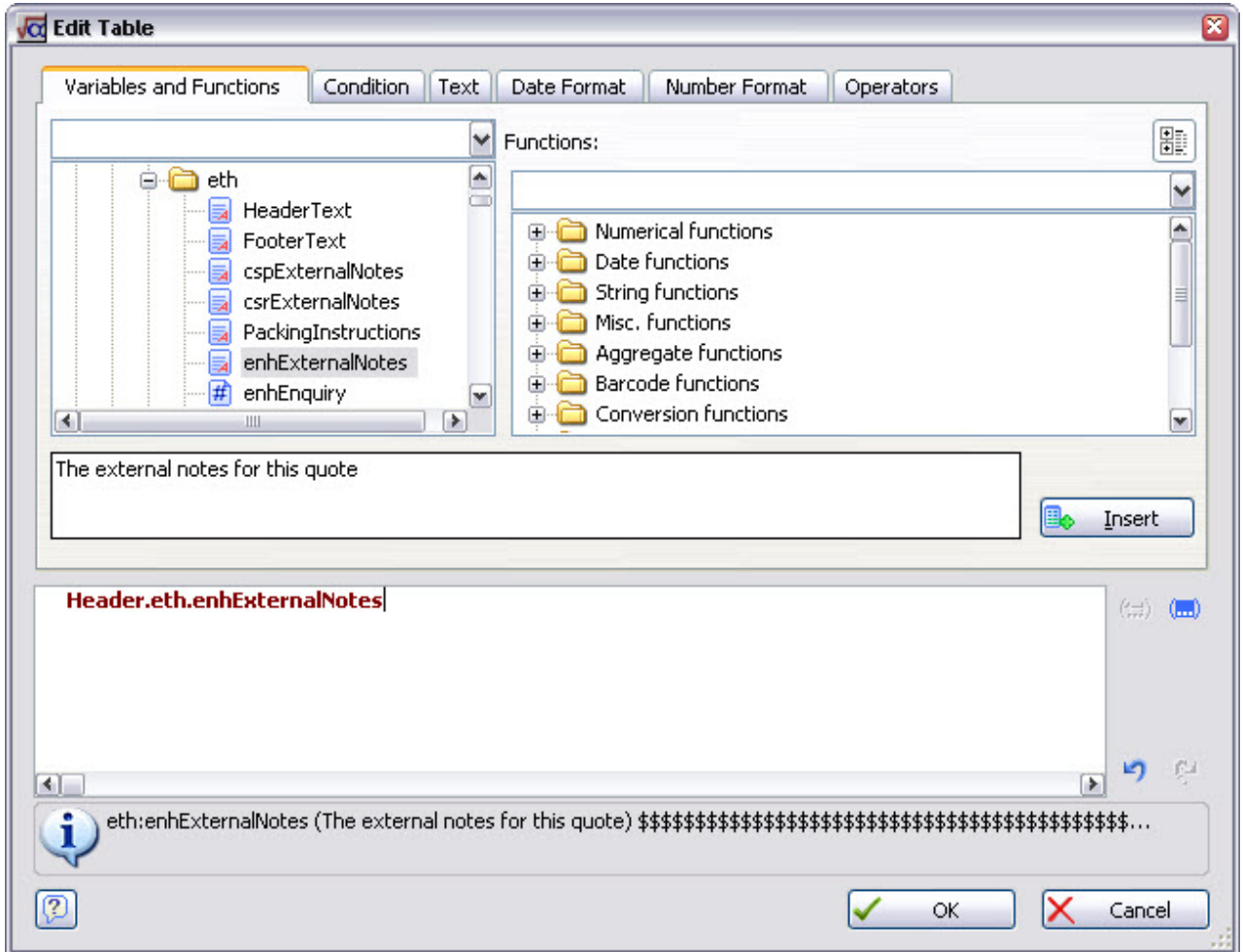
To do this, double-click on the table to open the **Table Contents** form, then select the **Footer Line** tab. You will be presented with the Choose a Table Line Definition form as shown below:



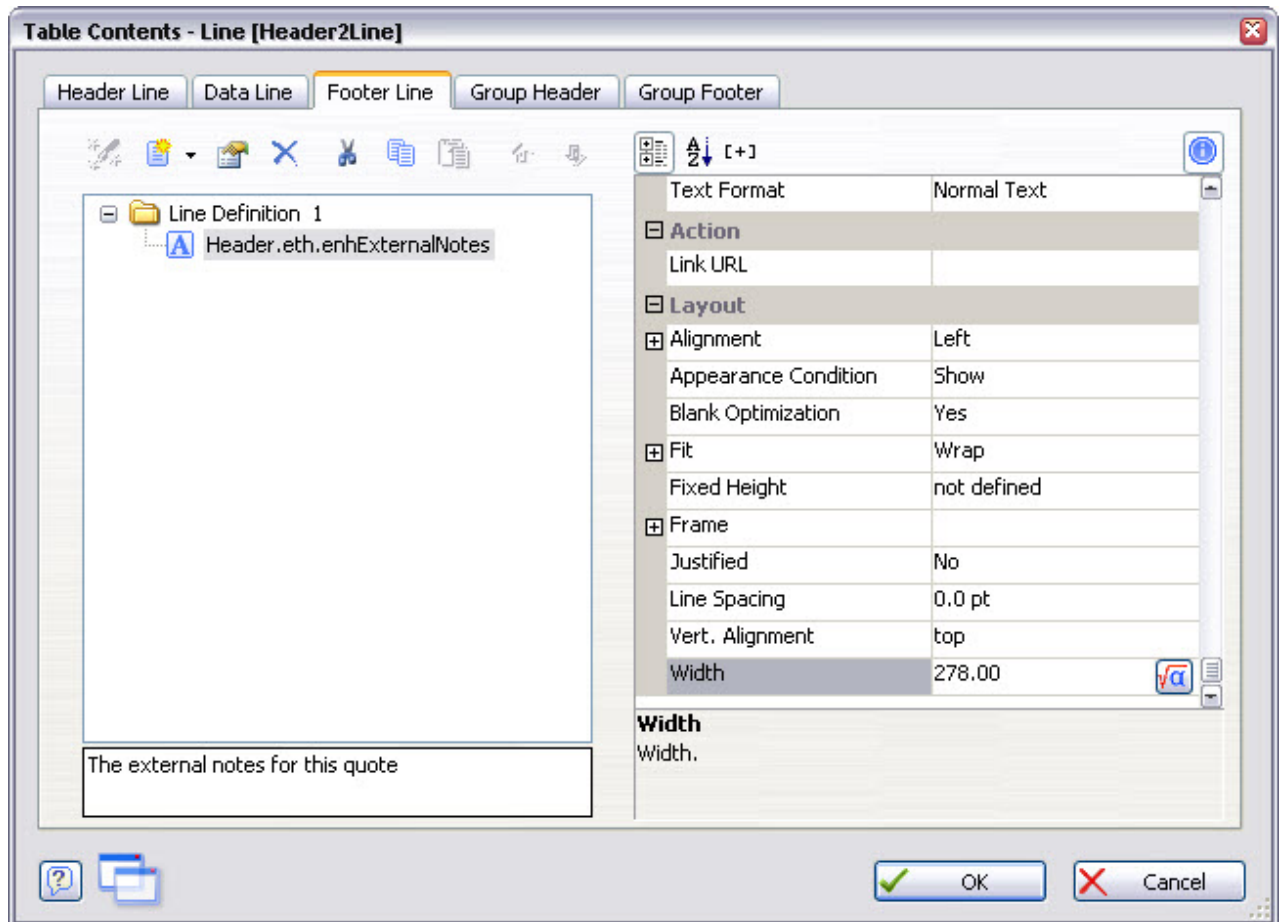
List & Label is asking you whether you want it to create footer entries to match the columns in our detail area. We don't want to do this, so select **Empty line** and press **OK**. The Table Contents form should now look like this:



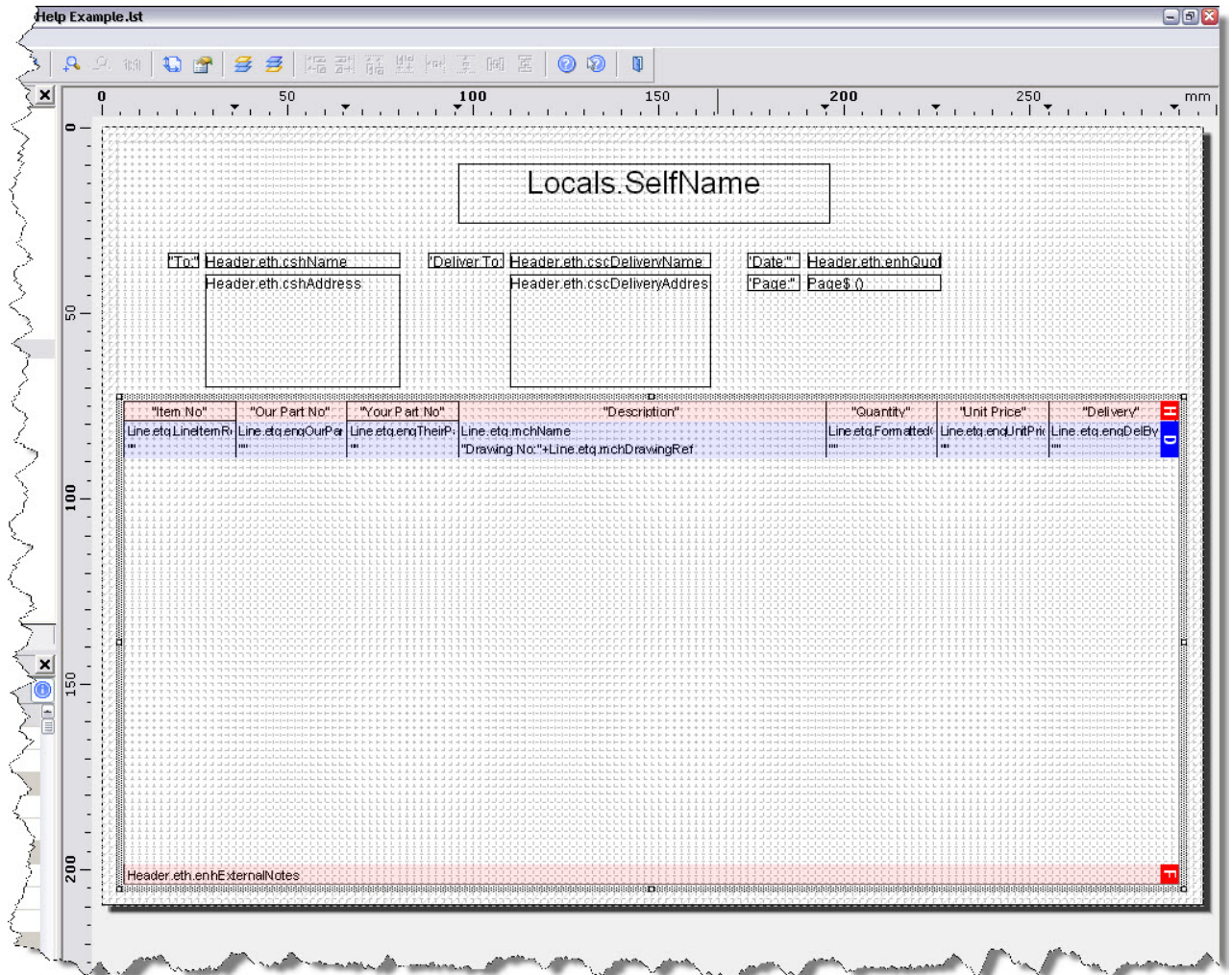
Footer information is entered in the same way as all other data in the table. The notes for the quotation as a whole are called `enhExternalNotes`; do not be confused by the fact that they are in the `Header` group of variables as shown below! (In this context Header simply means information relating to the quotation as a whole, rather than the individual items being quoted.)



Press **OK**, increase the width of the column to that of the whole table, and change the **Fit** property to **Wrap** to enable your notes to extend to more than one line, as shown below:



Press **OK** again to return to the design workspace, which should now appear as shown at the bottom of the next page.



10 Use of advanced features

This section covers a few more advanced features available.

10.1 Conditional printing

Up until now, this user tutorial has guided you through the basic processes that most of your business papers will require. However, *List & Label* also has a number of capabilities that enable you to incorporate more complex requirements into your papers.

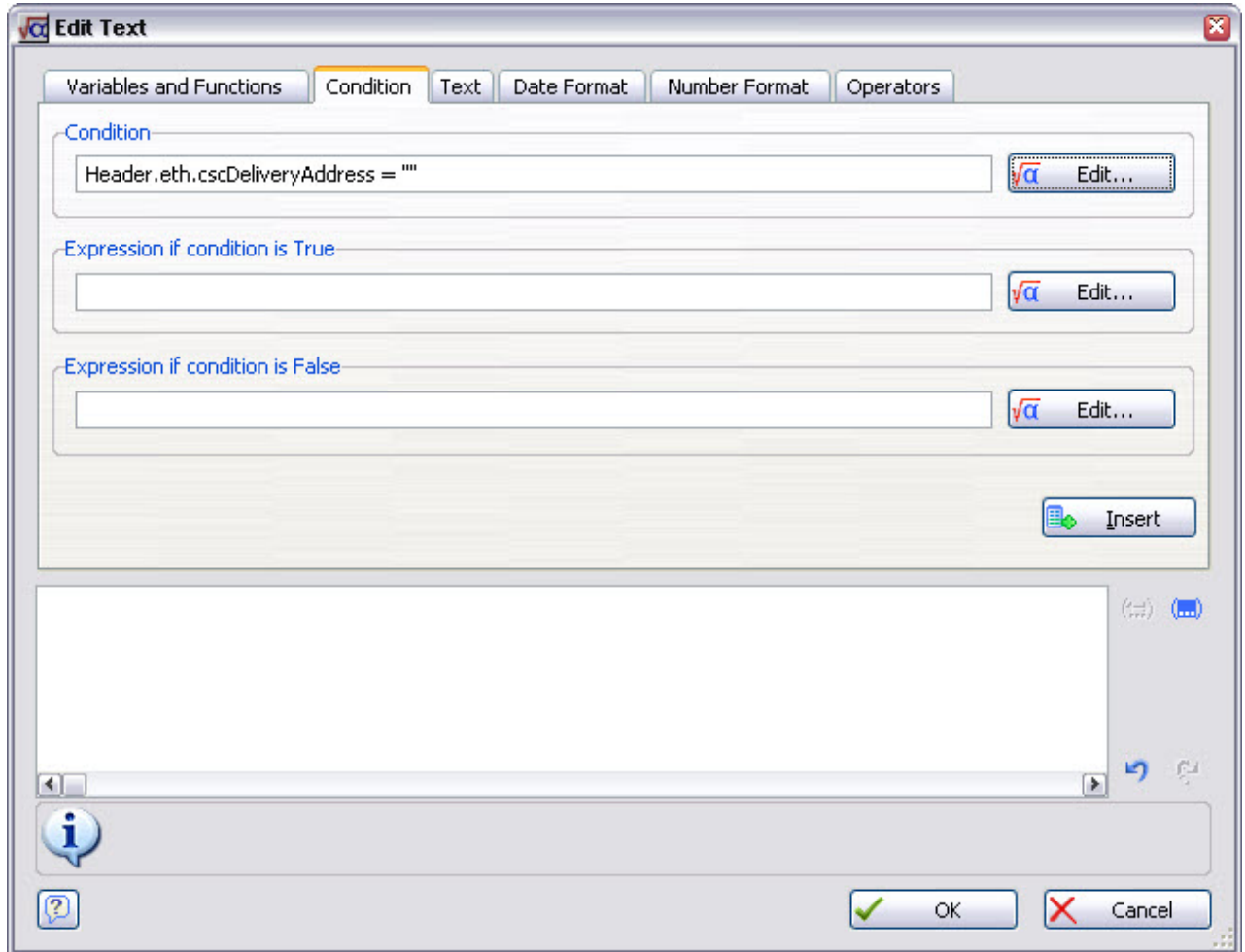
Most useful of these advanced features is the conditional expression. In the context of your business documents, this is saying: "if a field (piece of information) is equal to something, then print one thing; otherwise print something else". For example, in the quotation paper we have created throughout this tutorial, we could change the delivery address in the header section such that if no separate delivery address were specified for an enquiry, the quotation document would say "As Quote Address" instead of being left blank.

To do this, double click on the delivery address area in the paper, and then double-click again on the `Header.eth.cscDeliveryAddress` of the `Paragraph Properties` form. Click on the tab labelled `Condition` to reveal the form shown below:

List & Label helps you build up conditional expressions so that you don't have to worry too much about the syntax. First of all, delete the `Header.eth.cscDeliveryAddress` from the bottom box so that we can start again.

The condition we need to test for is whether the delivery address is blank. Press the **Edit...** button beside the `Condition` box to open another almost identical form. Select the delivery address from the list of variables in the usual way, and press **Insert**. Then add an equal sign, which you can either type in directly to the bottom box, or select from the `Operators` tab, select `=` and press **Insert**. To enter a 'blank', go to the `Text` tab and just press **Insert**, or type in two double quotation marks yourself. Your form should appear as shown below:

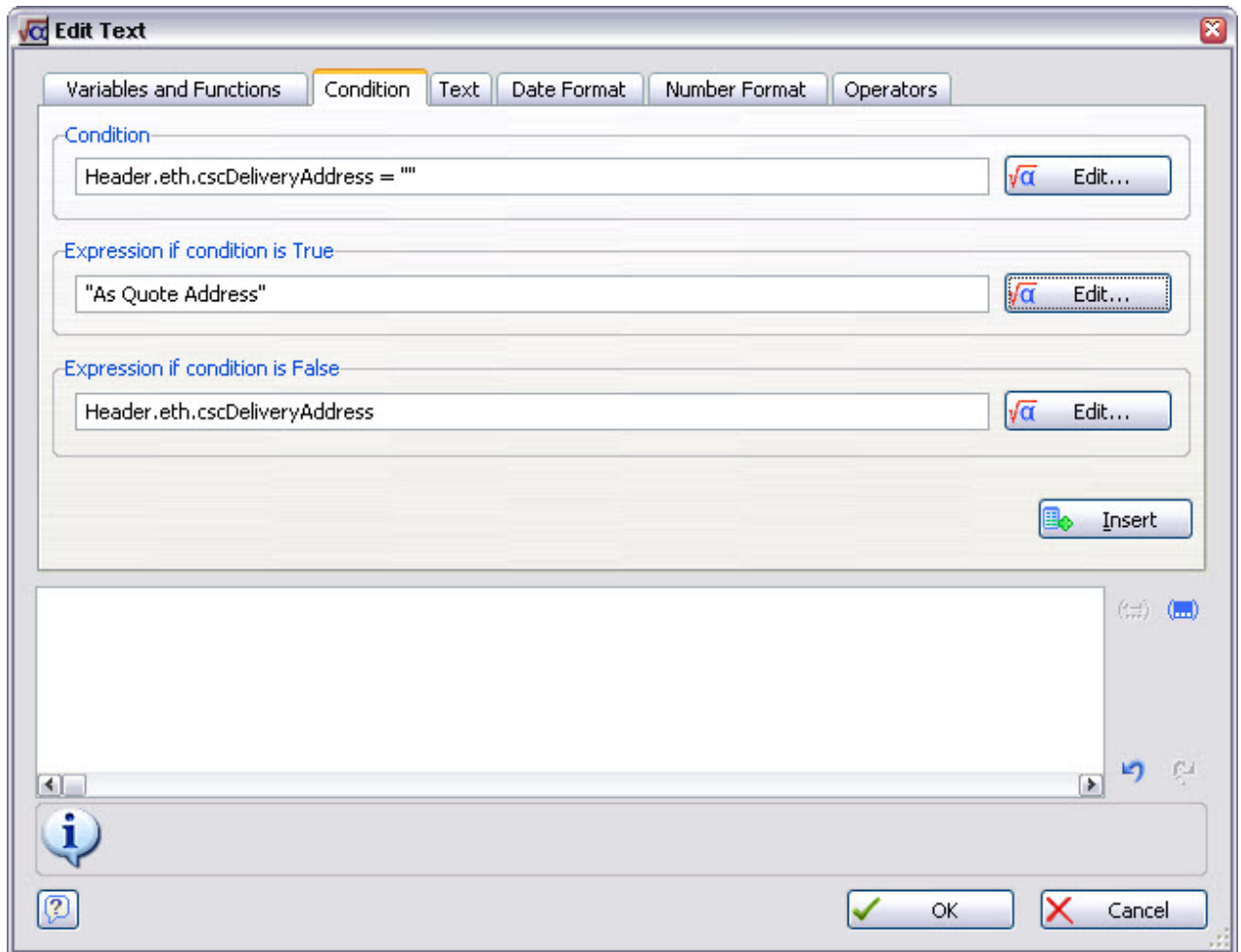
Press **OK** to return to the condition form which will be as shown below:



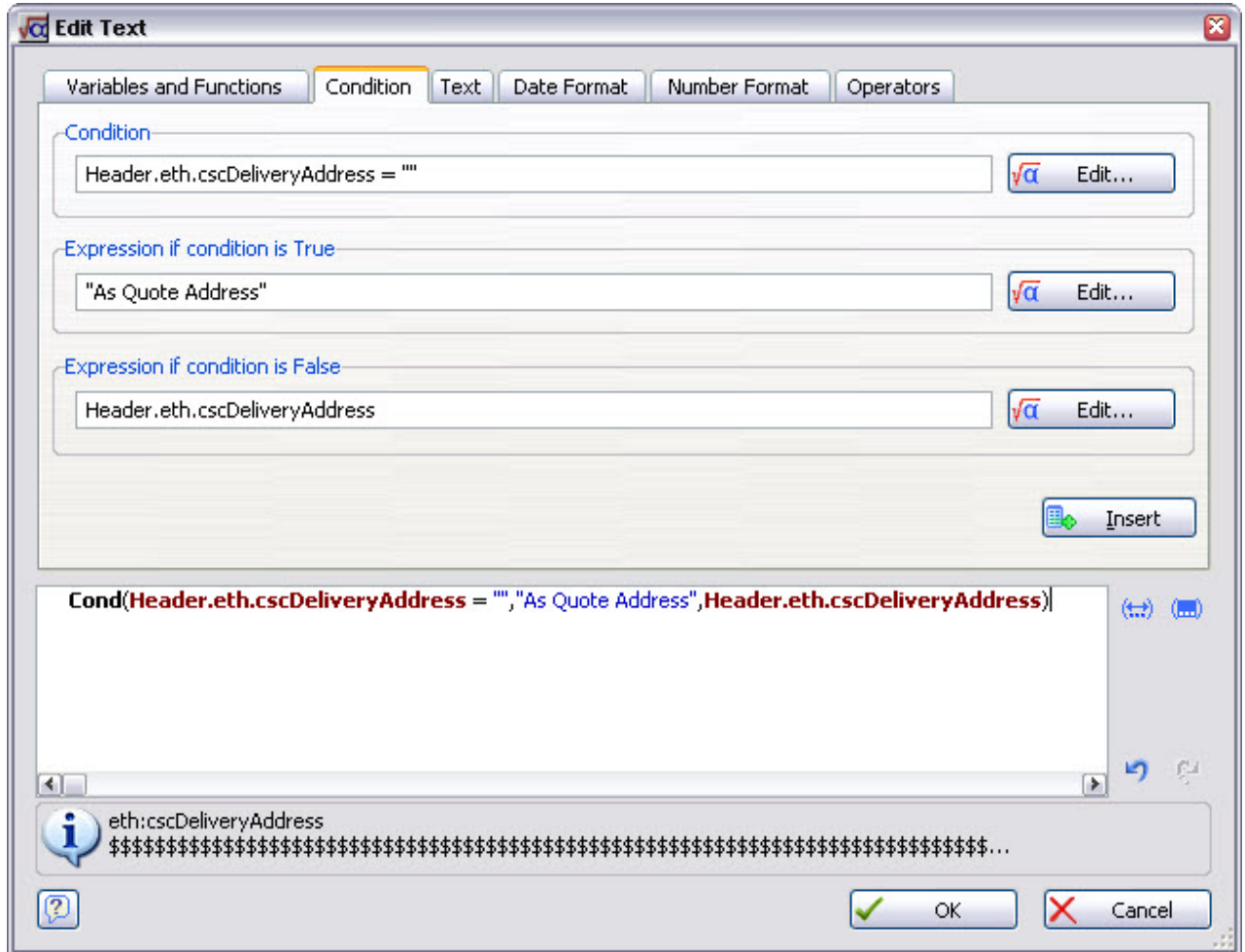
The first part of our conditional expression is now in place.

The second stage is to specify what we want to print if the condition is true – that is, if there is no delivery address. Press the **Edit...** button beside the **Expression if condition is TRUE** box, select the **Text** tab and type **As Quote Address**, then press **Insert** and **OK** to return to the condition form. This completes the second part of the conditional expression.

You can probably guess what you need to do now: press the **Edit...** button beside the **Expression if condition is FALSE** box, select the **Variables and Functions** tab and select the delivery address from the list of variables in the usual way. Then press **Insert** and **OK** to return to the condition form. This completes the third and final part of the conditional expression, and the condition form will be as shown below:



If you now press the **Insert** button, *List & Label* will build the conditional expression automatically from the three elements you have provided, as shown below:

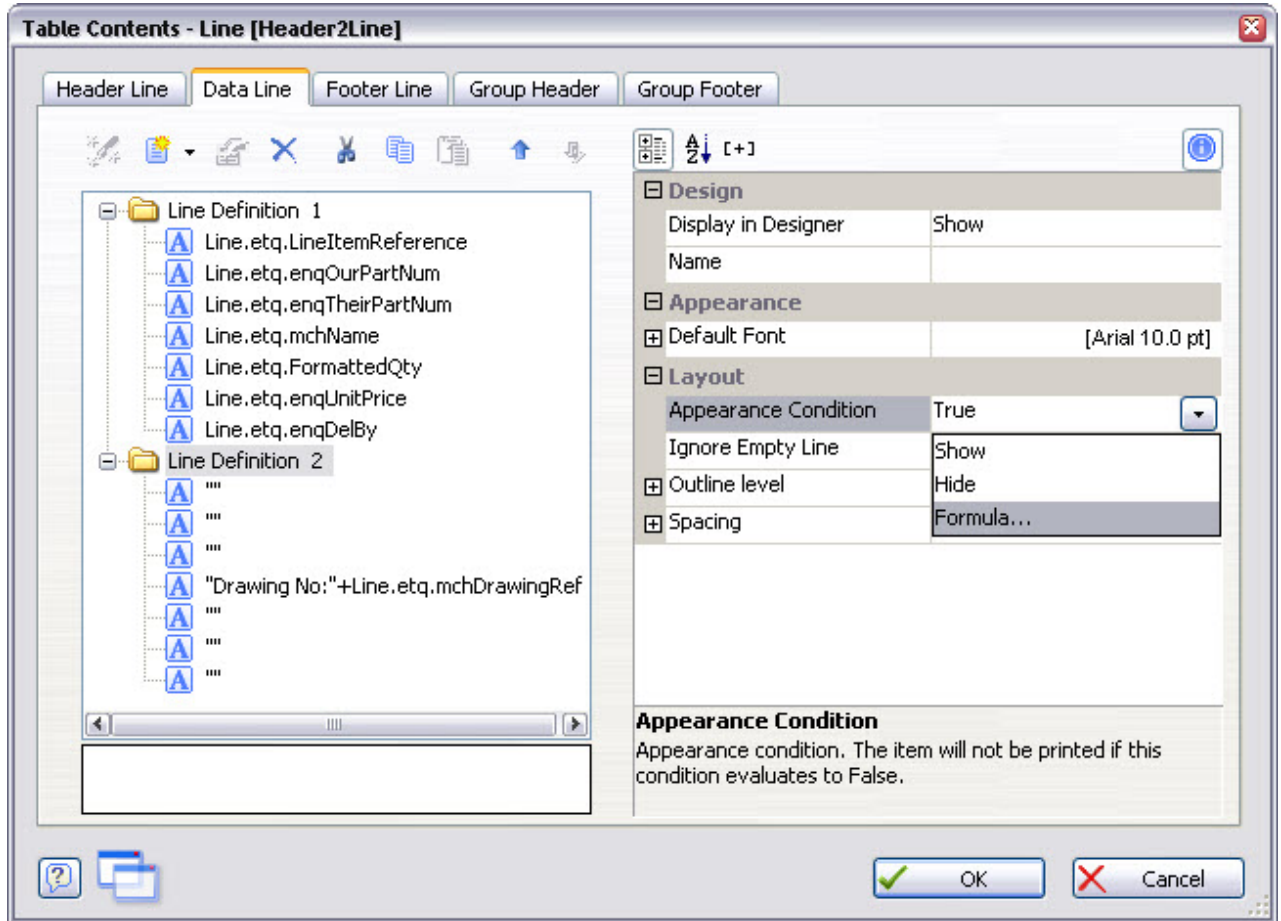


The structure of the expression is similar to that found in spreadsheet packages you may have used. Press **OK** twice to return to the design workspace.

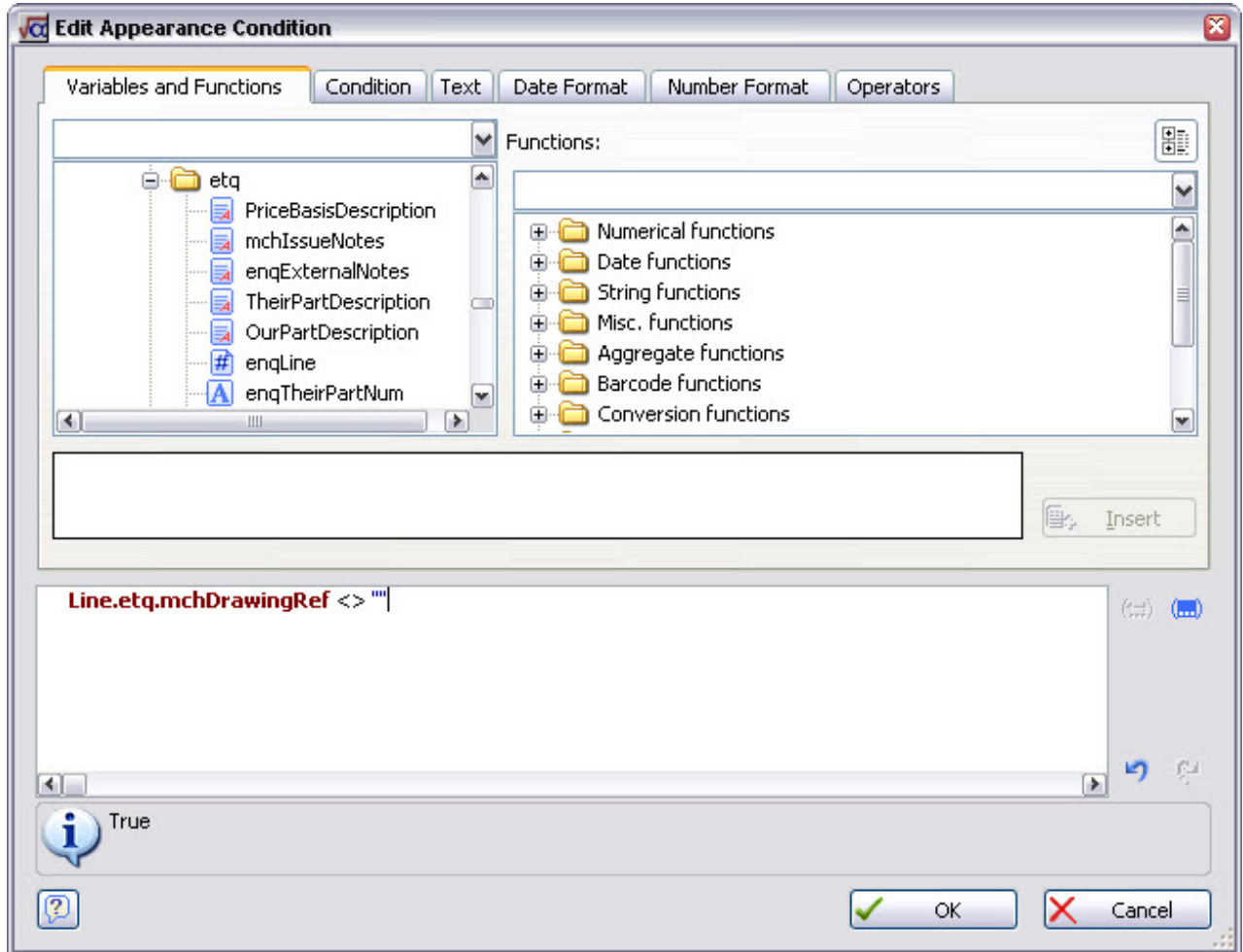
There are numerous uses for conditional expressions. For example, documents usually look better if the printing of fixed text is suppressed when the variable information associated with it is blank. Hence your paper may contain **Drawing No:** as fixed text, followed by a variable drawing number taken from Match-IT; if this number is ever missing, your document will still say **Drawing No:**, but have nothing after it. You can prevent this by using a conditional expression.

Another form of condition available to you is appearance conditions. These allow an entire row of data from the details section of a paper to be suppressed if a condition is false. This can be useful in situations where you want to vary the column structure of the details section in a paper according to a specified condition. For example, if you cancel a line of a purchase order to a supplier, you will need to send your supplier written advice of this. In this situation, you might want to replace several columns in your purchase order paper (e.g. quantity, price, delivery date) with a single column saying **ORDER LINE CANCELLED**. Two data lines are therefore required in your table: one which specifies what to print if the order line is not cancelled (the usual condition), and a second to specify what to print if it is. This can be achieved with appearance conditions.

To do this, select the data line in your table that you want to control in this way, select the **Appearance Condition** property, drop down options and select **Formula...**, as shown below:



You can build any legitimate expression in the usual way, using combinations of variables, text, functions, etc. The illustration below is an appearance condition created for the second data line in the example used in this tutorial (which adds the drawing number into the `Description` column of our paper).



The appearance condition is saying: “only print this second line of data if a drawing number is present for the part being quoted”. (Note: ‘not equal to blank’ is the same as saying ‘is present’.)

There are many other facilities available in *List & Label*. Far too many to mention here. Explore the *List & Label* help file and experiment. With a bit of imagination you can do amazing things.

10.2 External functions

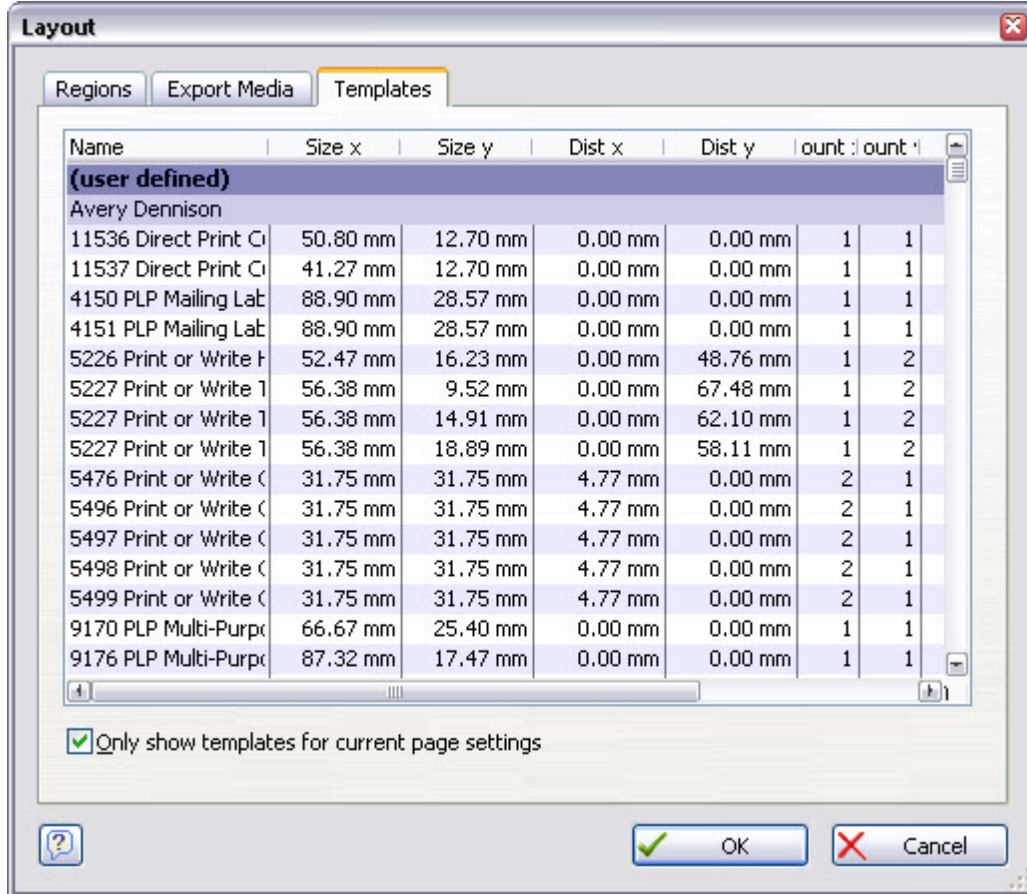
In the paper designer there is a function available called `External$()`. This is used to provide access to certain *wizard operations* from within your paper. The `External$()` function takes a single string parameter. That string must be formatted as a CSV list (Comma Separated Value) of terms. The first term must be the wizard operation name. Subsequent terms are whatever parameters are required by the wizard operation.


Only wizard operations that are of type FUNC can be used, and they must produce a string result and only take input string parameters. Consult the wizard operations help to see the list of operations available. Examples are `gxDeQuote` and `nmGetText`.

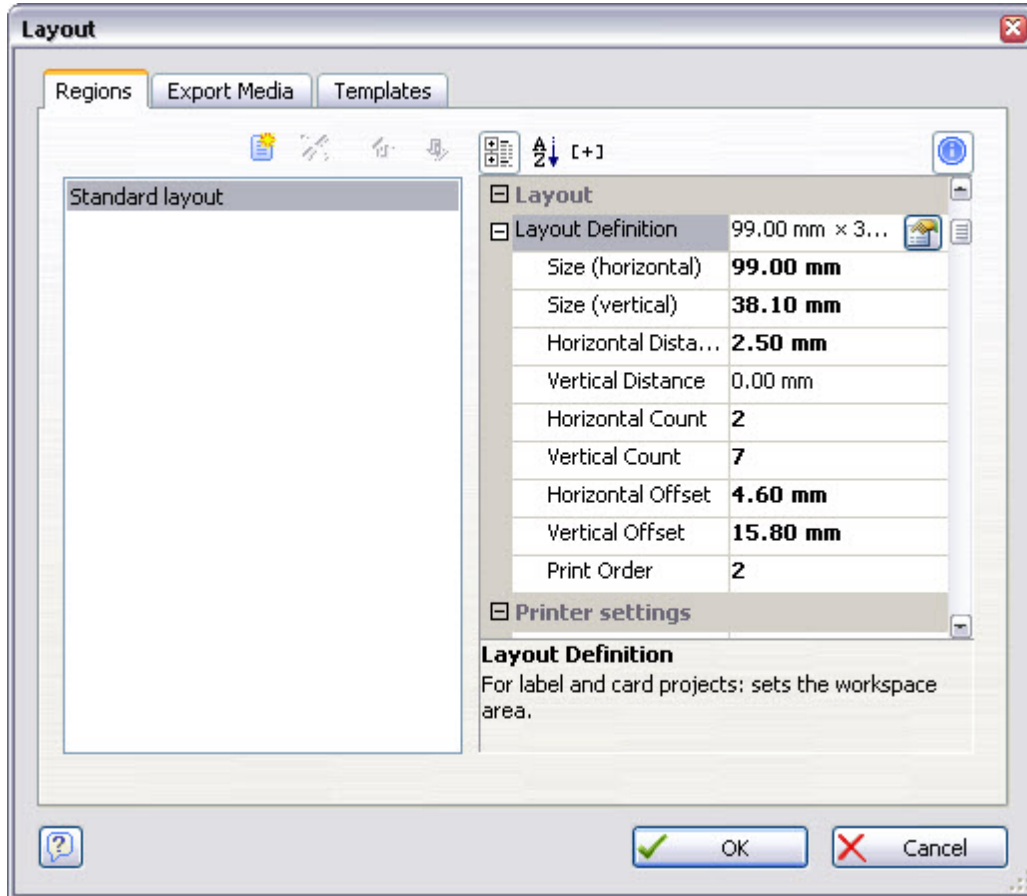
If the parameters to be passed to the operations could contain commas (,) or quotes ("), then enclose the string in double quotes ("), e.g. `External$('nmGetText',''+Method.mcb.Notes+'')`

11 Printing Labels

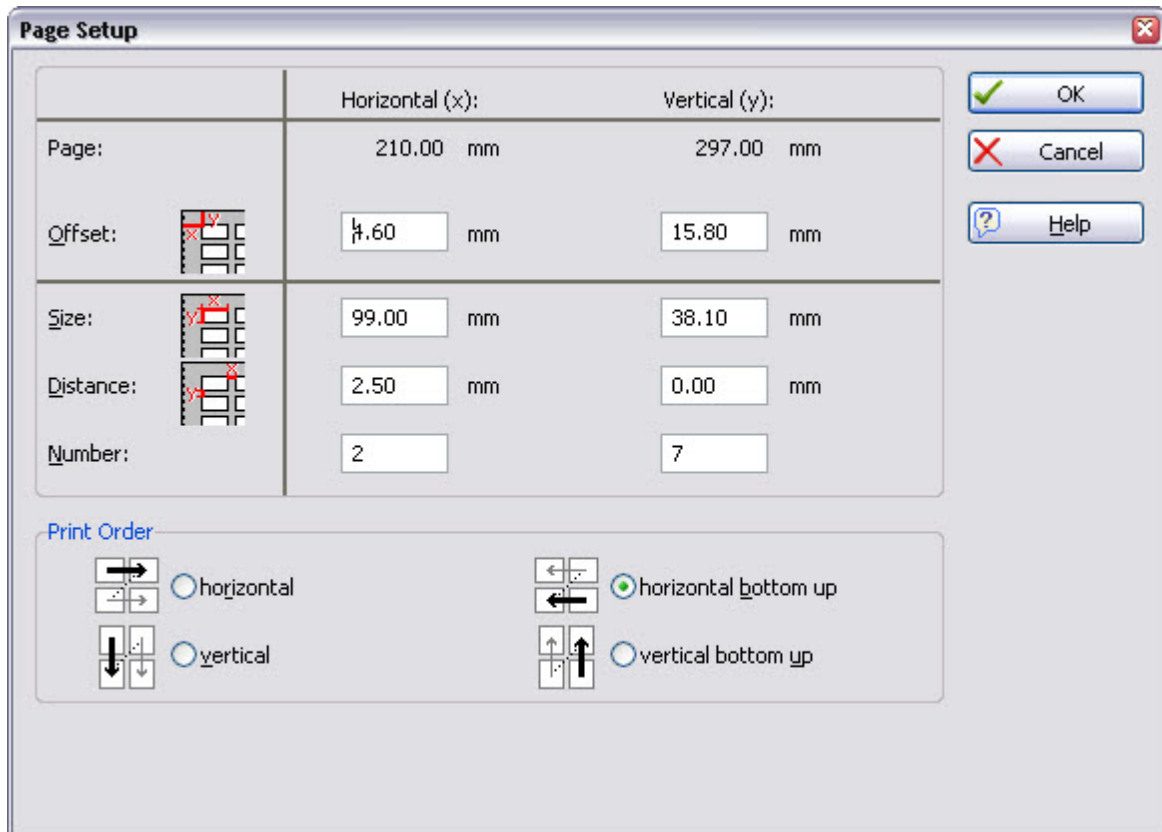
Papers for labels are produced in much the same way as any other business document. The most important difference is that when designing for labels, *List & Label* provides a large number of standard labels sizes for you to choose from. This facility is accessed by selecting **Project | Page Setup...** from the *List & Label* menu bar. When designing a label, the Layout form has an extra tab called **Templates** as shown below:



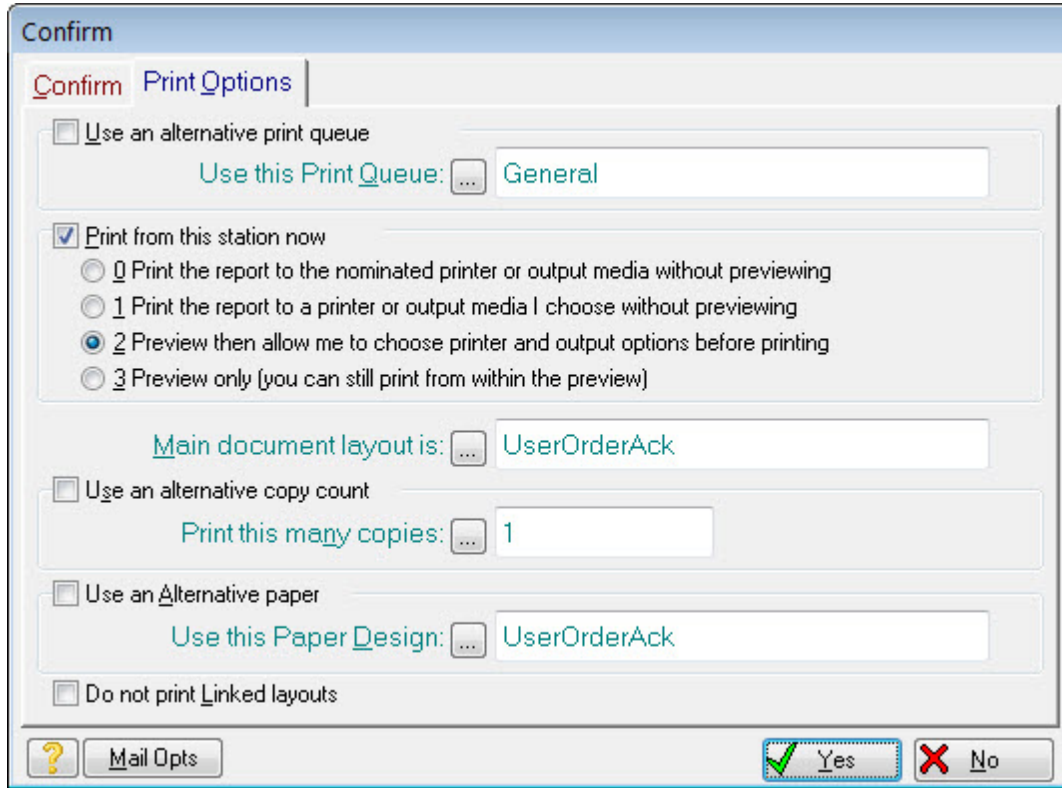
Select the size you require from the list on the **Templates** tab, or if it is not available you can create your own by setting the dimensions manually. To do this select the **Layout Definition** property on the **Regions** tab and click the  icon that appears, as shown below:



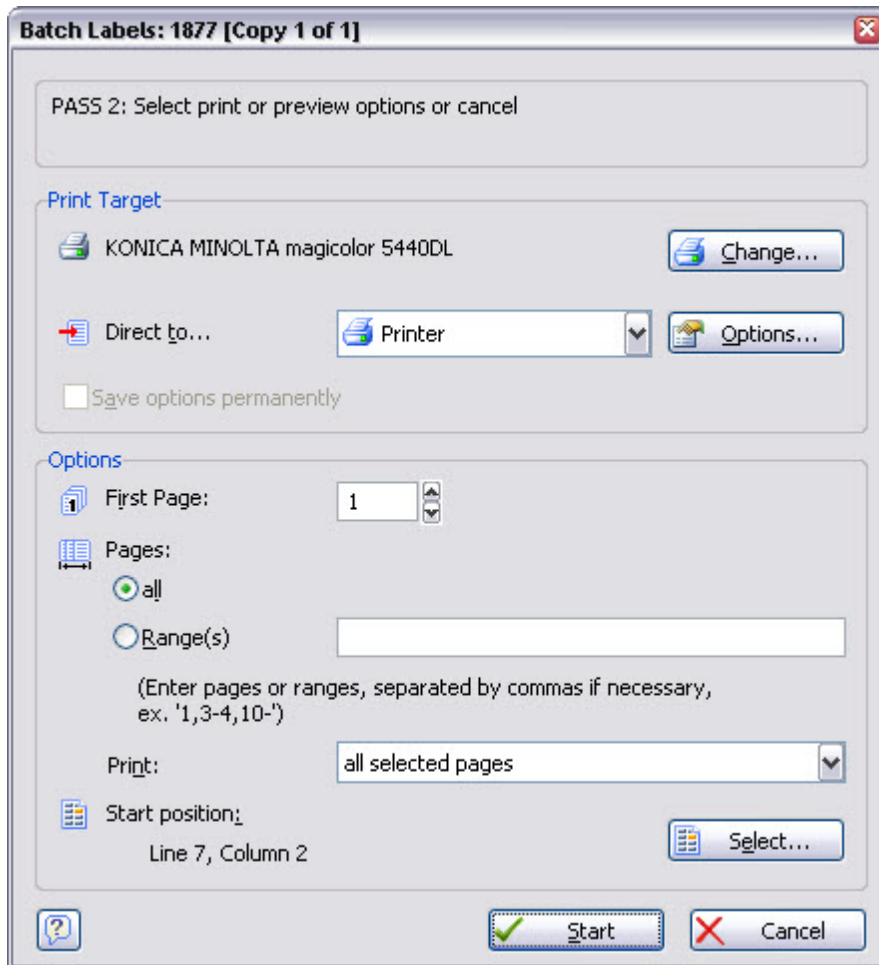
You will be presented with the Page Setup form like this:



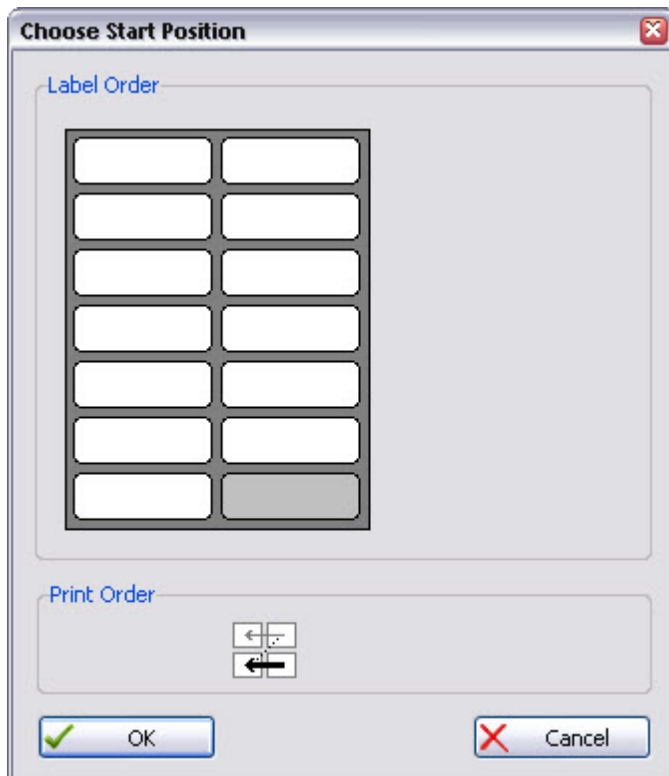
When you come to use your label paper to print labels, you can direct Match-IT to print from a specific location on a part-used label sheet. For this option to be available, the **Print on this station now** and **Preview then allow me to choose a printer...** options must be checked on the Match-IT **Confirm** print dialog form, as shown in the illustration below:



Pressing the **Select...** button on the **PASS 2: Select print or preview options or cancel** dialog that then appears activates a form that allows you to specify which label position on the sheet should be the starting point for printing.



The form will look similar to that shown below:



You will see an image of the layout of the labels on the page which will reflect either the template you selected or the dimensions you specified when designing the label. Just click in the space where you want the first label printed.

When designing the label, you can also specify the direction in which printing proceeds from the starting position if more than one label is to be printed at a time.



Four options are available as shown in the **Print Order** group on the **Page Setup** form. While top-left to bottom-right seems natural, this can increase the risk that labels from a partly used sheet detach during printing and jam your printer. Using the labels on a sheet from the bottom towards the top reduces this risk; to implement this, select the **horizontal bottom up** option.

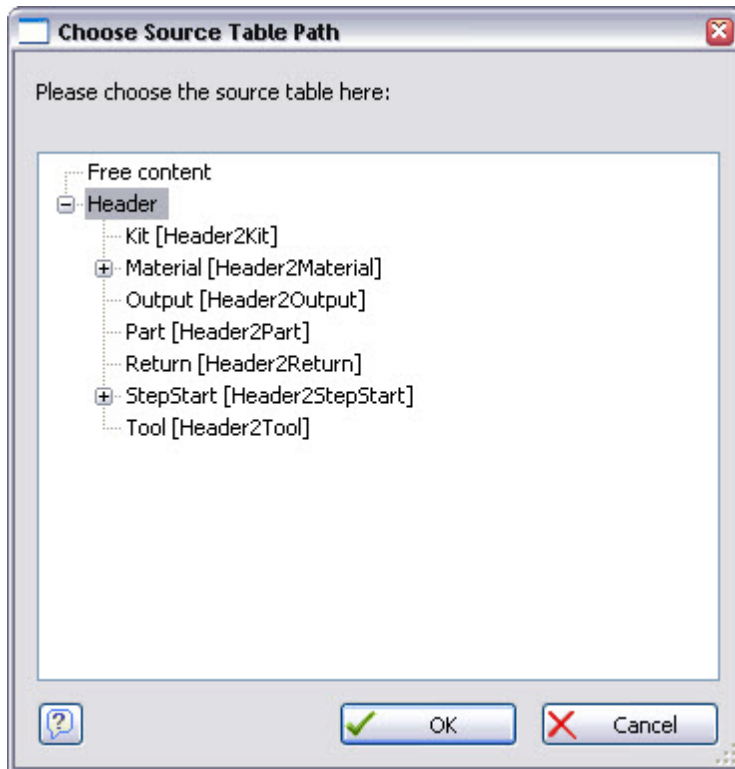
Like other business documents, labels can display different types of information: fixed text, variables, graphics, bar codes, etc., and these are entered on your label papers in the usual *List & Label* way. As before, the variables that are available to you will be those that are appropriate to the type of label paper you are designing.

Note that you cannot put tables on labels since the concept has no meaning in this context.

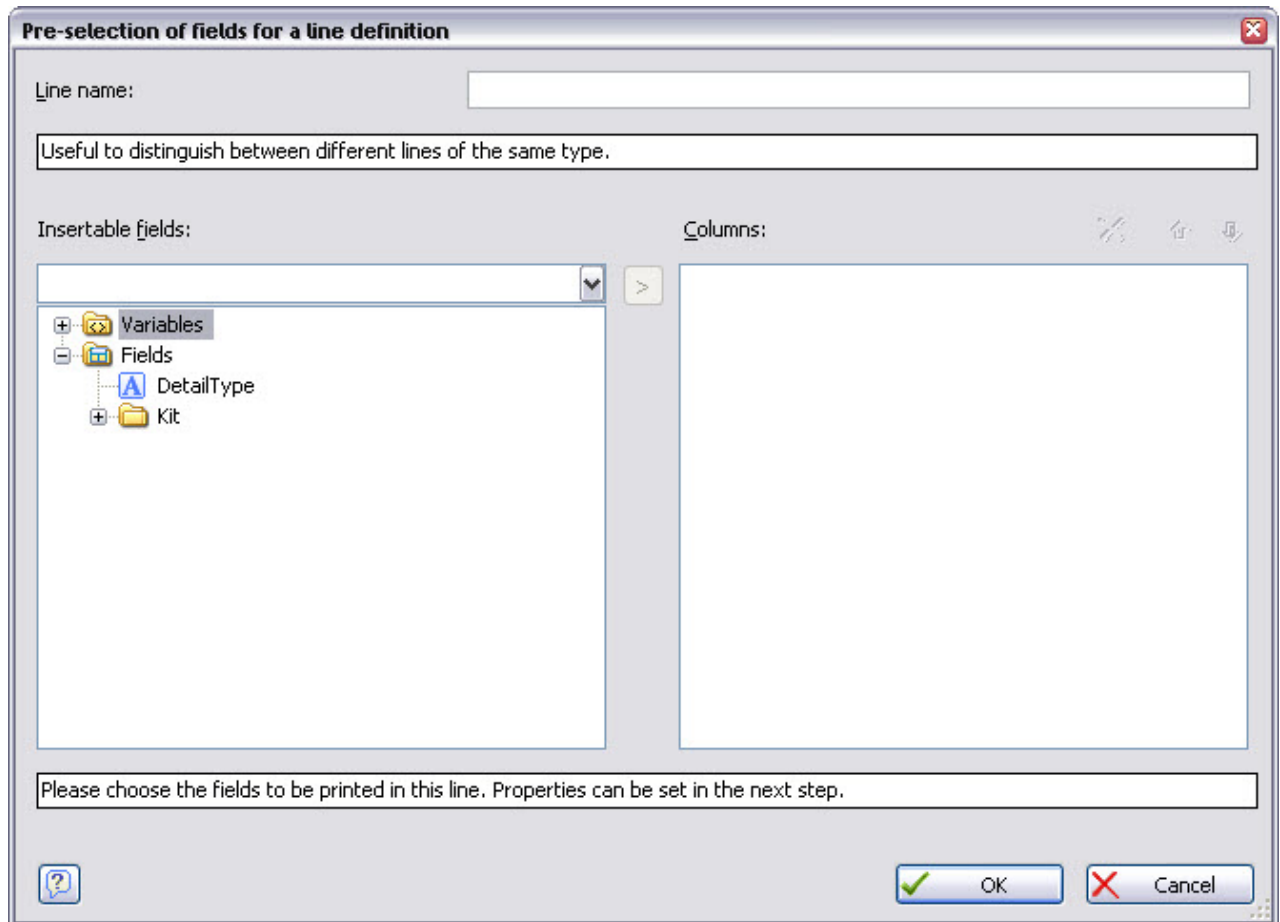
12 Printing Multiple Tables

The example we have used so far only had a single table in the paper. This is all that is available for a quotation. However, some documents in Match-IT can have more than one table, for example a dispatch note has two (the dispatch items and the stock batches that make up those items) and a works order can have up to eighteen!

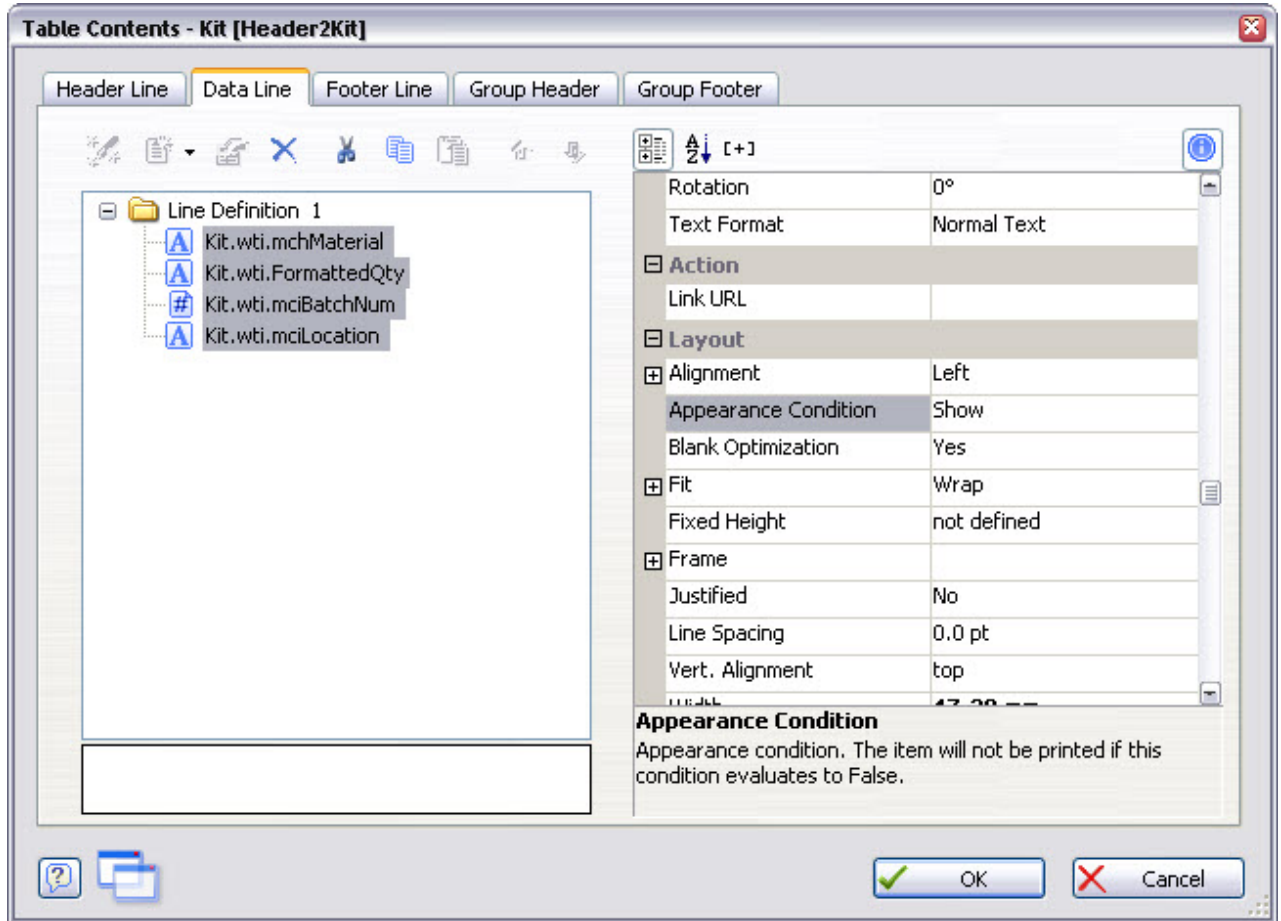
When more than one table is available, when you create the first one you will be asked to select the data table. A form similar to the one below will be shown as you release the mouse after having drawn the area for the table:



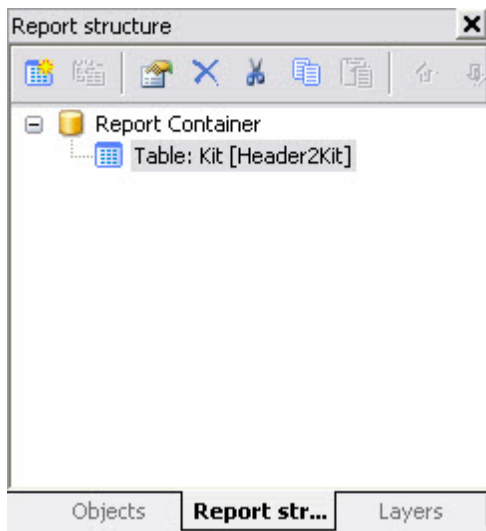
This will show all the available data tables. Select the one you want, another form will then be shown like the one below:



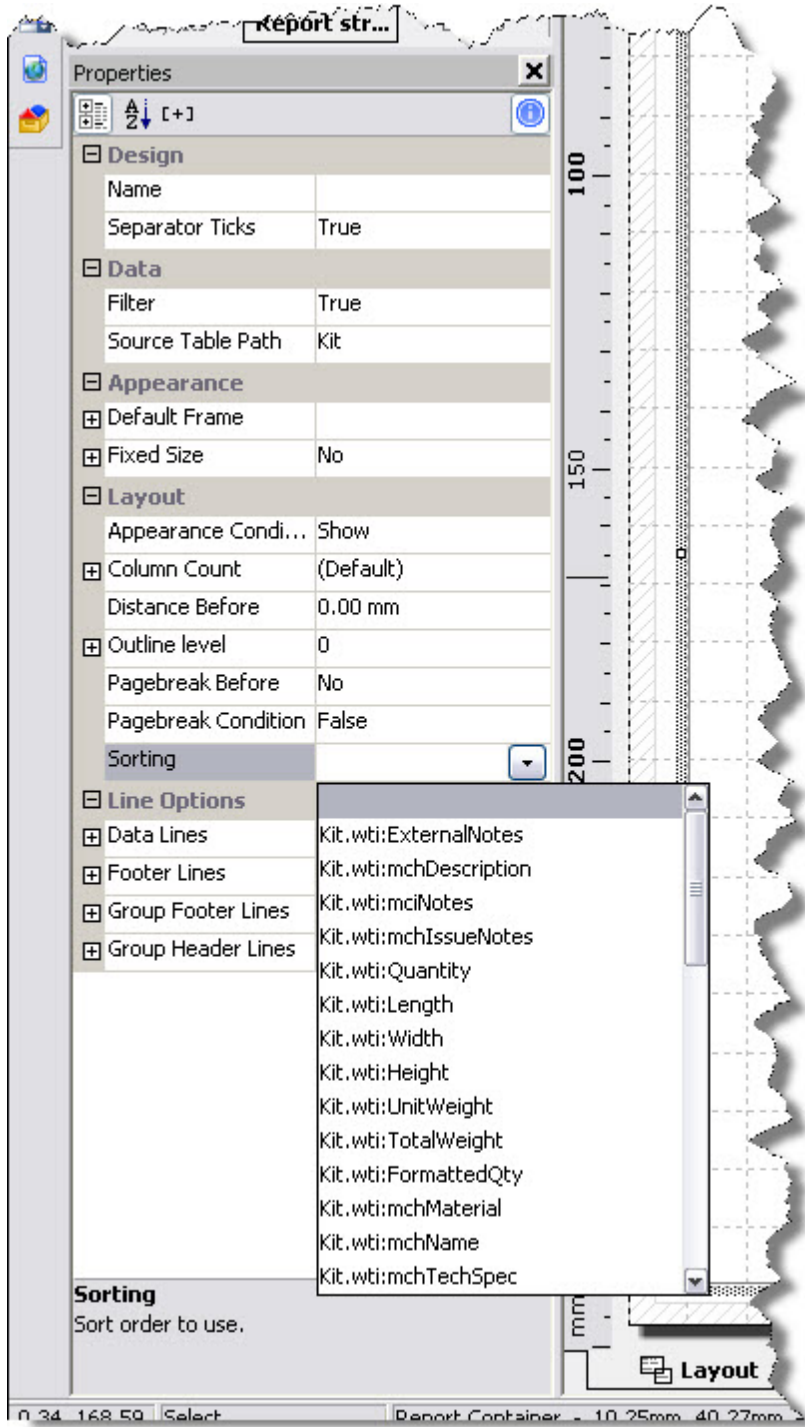
This allows you to quickly select the fields you want by dragging them from the left pane to right pane. Only fields that are valid in the context will be shown. After dragging, press **OK** and the table contents definition form you've already seen above will be shown:



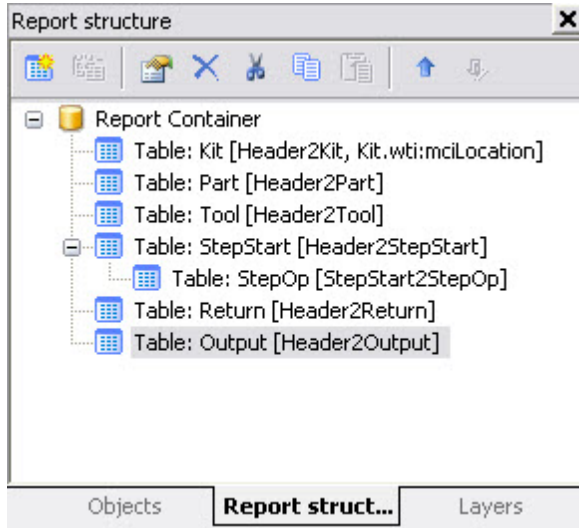
This can be edited in the same way as you've already seen. When you've done that and pressed **OK** to get back to the design workspace, you'll see a pane called the **Report Structure** (if this is not visible, press **View | Windows | Report Structure** in the menu). Initially it will show just a single table, like this:



You can now add more tables by using the tools available from this pane. Each table will occupy the same area on your paper, but the information content will be different. The tables will be printed in the order you see them here. You can also specify the order the records are printed within each table. To do this, press the drop-down on the **Sorting** property in the properties window, as shown below:



For a complete example, open the [UserJobCard](#) paper in Match-IT and explore how it is setup. The table structure for that is shown below:



In this example, the kit section is printed, then the parts list, then the tools list, then the steps, then the kit returns, then the outputs. Within each step, the operations (resources) are printed.

Each table can be printed more than once if you want, for example you could print the kit list twice, once in location order and then again in batch number order. To do this, just add it to the structure again.