Document templates

Administration tool

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Introduction

What is a document template?

A document template is a **dynamic Word document**. It is used as a template if you want to use it many times, and allows you not to retype the same document every time.

A document template is necessarily **linked to one or several forms**. Indeed, the attributes that come from the forms are used to create the dynamic part of a document template.

Once created and configured, a document template is **implemented in a process** and is automatically generated according to its **attribute values**.

Document template composition

A document template is composed of two parts:

- The **"static" text** : this text always stays the same, regardless of the recipient of the document, date, etc.

  For instance: the header or the salutation.

- The **tags** corresponding to the attributes coming from the form: these are the elements that are often modified from one file to another.

  For instance: the recipient, the place, the date.

Example

Scenario

Let us take an example that we will follow until the end:

A company receives a large number of invitations to various events: contract signings, project launchings, presentation of its product, etc. The company wishes to replies to the invitations more quickly and in an automatic way.

Instead of replying individually to each event, the company sets up a process allowing a quick **analysis** of the invitations, as well as the creation of an **automatic reply**, in the form of a **template document**.

The **analysis** will be made through a form that gathers the main data located in an invitation: name of the company and of the person in charge of the event, date and location of the event. This form will then be duplicated to add a Boolean attribute, so the person responsible for the decision can accept or turn down the invitation. According to his choice, the document template will be different: one will be adapted to the acceptance, the other to the refusal.

Finally, once the invitation is accepted or turned down, an EDM task will sort it in the tree view.

Roles

We can imagine the creation of two roles:

- **Secretary**: the secretary starts the first task of the process as soon as he receives an invitation. He analyzes the invitation, scans it, then fills in and sends the form with the details required. A new task is thus automatically created. The secretary also receives a notification if a technical error has occured.
- **CEO**: the CEO receives the newly-created task in his inbox. He browses the form details that the secretary has filled in. Thus, he finds easily the details he needs to know, and decides to accept or turn down the invitation.

Word document

We first will create a Word document corresponding to the acceptance of an invitation:

SIATEL France

12, rue de Paris, Paris

01.66.66.66.66

Rouen prefecture

20 avenue du Général de Gaulle, Rouen

01.77.77.77.77

Subject: About your invitation

Mr. Peter Quinn,

We have the pleasure to accept your invitation related to the launching of our shared project, on the 22th of August 2015, in Rouen.

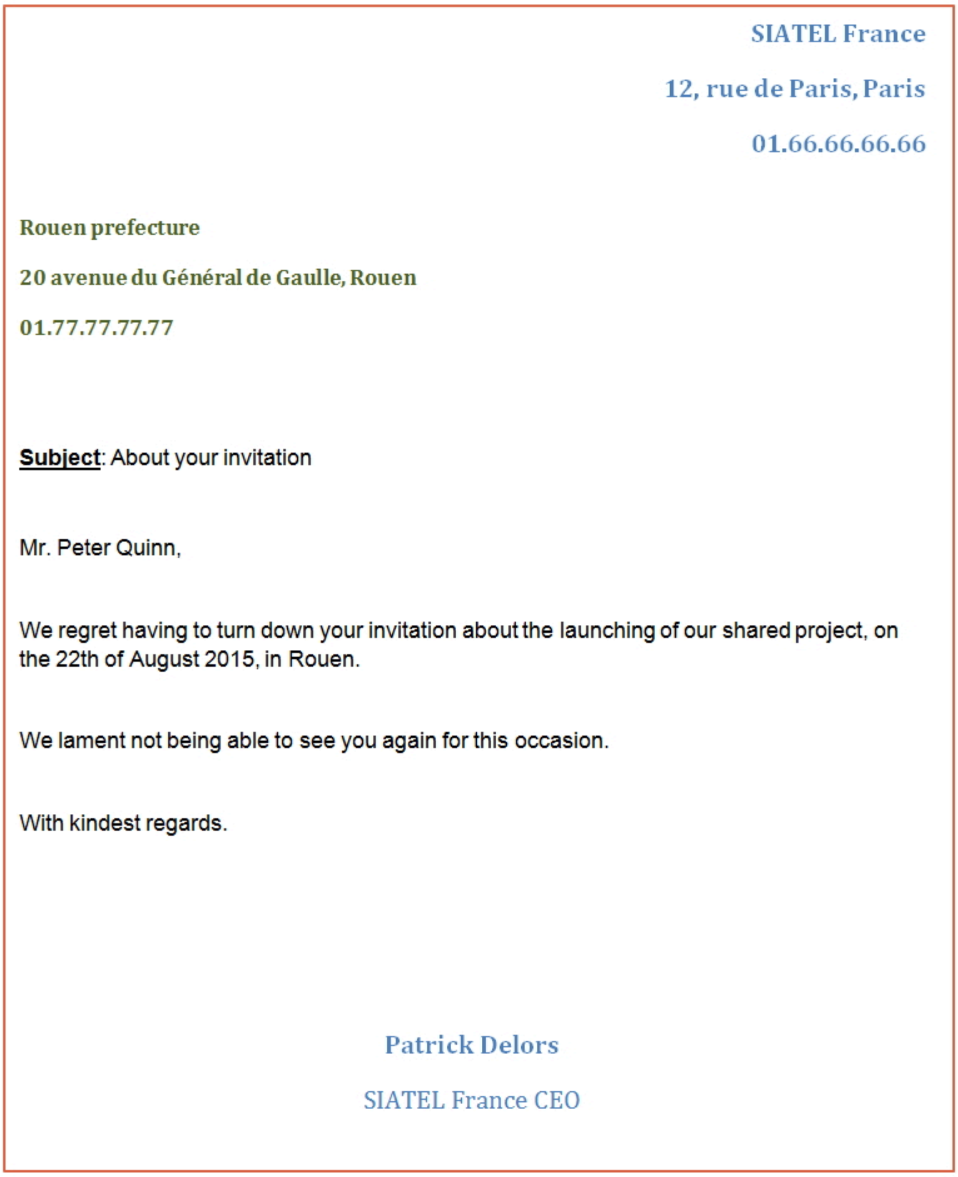
We are looking forward to seeing you again for this occasion.

With kindest regards.

Patrick Delors

SIATEL France CEO

Then corresponding to a refusal:



SIATEL France

12, rue de Paris, Paris

01.66.66.66.66

Rouen prefecture

20 avenue du Général de Gaulle, Rouen

01.77.77.77.77

Subject: About your invitation

Mr. Peter Quinn,

We regret having to turn down your invitation about the launching of our shared project, on the 22th of August 2015, in Rouen.

We lament not being able to see you again for this occasion.

With kindest regards.

Patrick Delors

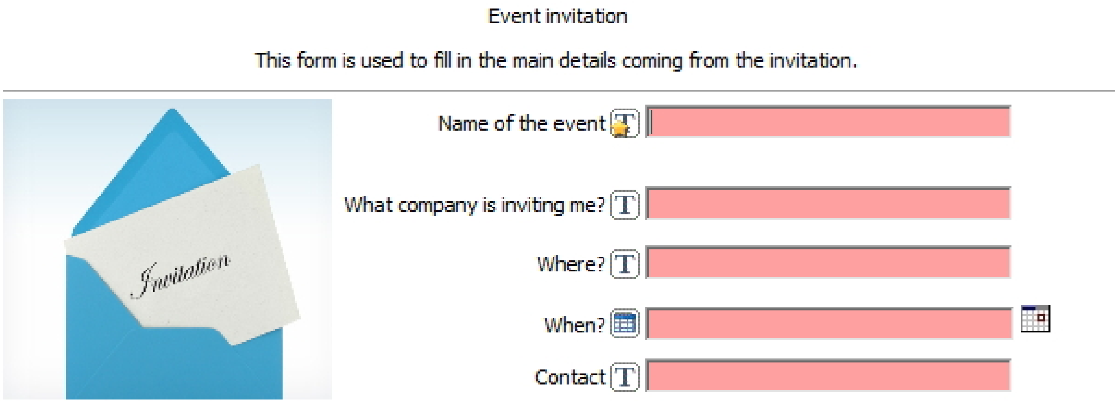
SIATEL France CEO

Notice that, for the time being, the whole text is static. You will learn how to blend the dynamic part of the document in it later.

These two Word documents are the two document templates. They will be the response bases for every invitation.

Forms

We then will create a form allowing to sum up the main details of an invitation: event organizer, location, date, etc.


Event invitation

This form is used to fill in the main details coming from the invitation.

Name of the event

What company is inviting me?

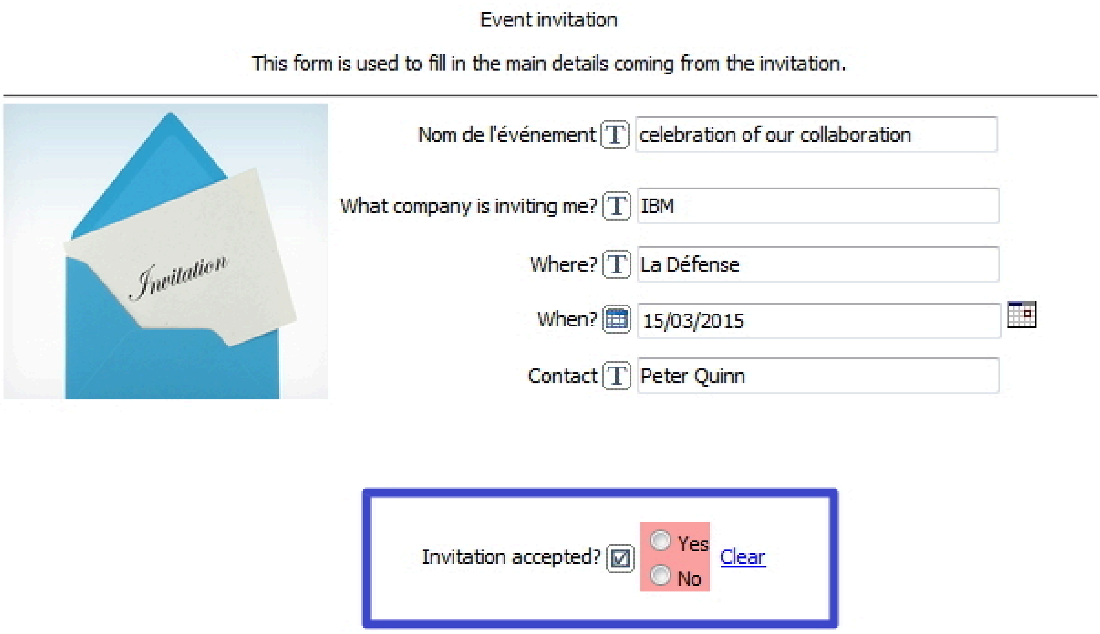
Where?

When?

Contact

The form above is intended for the secretary, in charge of the invitation analysis.

We will now duplicate this form to add a Boolean-like attribute for the CEO, so that he can accept or turn down the invitation:


Event invitation

This form is used to fill in the main details coming from the invitation.

Nom de l'événement: celebration of our collaboration

What company is inviting me?: IBM

Where?: La Défense

When?: 15/03/2015

Contact: Peter Quinn

Invitation accepted? Yes / No Clear

The attribute values that we have included in these two forms will be reproduced by the document templates.

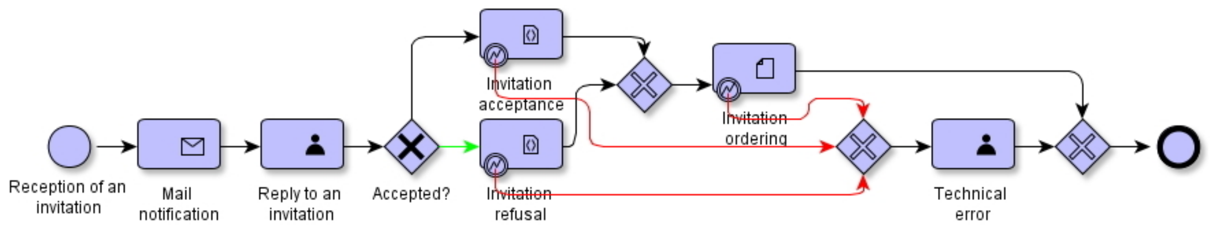
Thus, it is important to get every attribute to be mandatory, so the template can be properly filled in.

Process

The process will thus be made up of several tasks:

1. A start task: The secretary analyzes and scans the invitation, then fills in the appropriate form.
2. A mail task: Automatic task. A mail is sent to the CEO to inform him that he has received an invitation and that he has a pending task.
3. A reply task: The CEO receives the form filled by the secretary, accepts or turns down the invitation by checking the appropriate checkbox.
4. Two parallel **Document template** tasks: One related to the document template corresponding to the acceptance of the invitation ; the other related to the one corresponding to the refusal.
5. An **EDM** task: Automatic task. The system classifies the invitation in the tree view, according to the parameters assigned to the task.
6. A technical error task: The secretary receives a notification if a technical error has come up, related to the **EDM** and **Document template** tasks.

Here is an insight of the process described above:



Preparing a document template

As explained previously, a document template is a Word document. Thus, you have first to type a text according to its utility. To take our exemple again, we can imagine a first text related to the acceptance of an invitation. Then, in another document, another text related to a refusal.

It is in this document that you do all the shaping. Therefore, you can customize your document like you want to: header (with, for instance, the name of your company, name of the recipient, subject, etc.), logo, main text, salutation, signature and so on.

Once you have prepared your document, you must add it in the Administration tool, to combine it with a process.

Creating a document template in the Administration tool

To create a document template in the Administration tool:

1. Open the GARGANTUA database of your choice, in the Administration tool.
2. Click on the **Document template** subbranch.

   The **Manage document templates** window opens.

3. Click on **New**, at the bottom left of the right pane.

   The Add document template dialog box is displayed.

4. Name the new document template, and optionally add a description.
5. Click on **Browse** and select the document template you have previously prepared.

   Only the .doc and .docx are supported by this feature.

6. Click on **Add**.

   The management screen of the new document template is displayed. You have created a document template in the Administration tool.

Now that you have created a document template, you have to combine it with a form, and implement it in a process, so that he can be generated automatically.

Creating a document template with translations

When you create a document template in the Administration tool, you can choose to add the same template, but translated into other languages. This feature spares you from configuring a new document template for each language, in the Administration tool. When configuring a **Document template** task in a process, it will be possible to select the document template that you want to generate in a process, in the **desired language**.

To add the translations for a document template at its creation:

1. Open the GARGANTUA database of your choice, in the Administration tool.
2. Click on the **Document template** subbranch.

   The **Manage document templates** window opens.

3. Click on **New**, at the bottom left of the right pane.

   The Add document template dialog box is displayed.

4. Name the new document template, and optionally add a description.
5. Check the **Enable translations** checkbox.

The flags of all languages (English, French, Spanish, etc.) supported by GARGANTUA are displayed in grey, under the Enable translations checkbox.

6. Click on the flag of the language for which you want to add a document template.

   The Windows explorer opens.

7. Choose the document template corresponding to the selected flag.

   Only the .doc and .docx are supported by this feature.

   The flag of the language for which you have just added the document template is now displayed in color, indicating that the document template has been added successfully.

8. Repeat, optionally, steps 6 and 7 if you want to add the document template in other languages.

9. Click on **Add**.

   The management screen of the new document template is displayed with its translations. You can preview the templates in each language, in the Preview tab, by selecting the language of your choice.

   You have created a document template with translations.

Manage document templates screen - Available tabs

The **Manage document templates** screen contains the following tabs:

- The **Properties** tab allows you to configure the main parameters of a document template. It also allows you to combine a document template to one or more forms and to add it to a package.
- The **Preview** tab allows you to get an insight of the final document template, in the language of your choice.
- The **Dependencies** tab allows you to display the items used by and that use a document template.
- The **Summary** tab allows you to display a summary of a document template.
- The **Log** tab allows you to view a list of all the operations performed in a document template, by filtering them according to some criteria.
- The **Help** tab allows you to access the contextual help.

"Properties" tab

In the **Properties** tab you can:

- Rename a document template (**Name** field);
- Add or change the description of a document template (**Description** field);
- Add the document template to a package or remove it from one (**Package** field);
- Enable translations and delete a document template from one, several or all language(s) (**Enable translations** checkbox, and, if necessary, **Reset** button);
- Change the document template (**File** field, **Browse** button);
- Add a document template in another language (flags). Available only if you checked the **Enable translations** checkbox;
- Combine a document template with a form (**Content** table);
- Select the form(s) for which you want to display attributes (**Forms** table).

Creating a dynamic document template

In Gargantua, to create a dynamic document template, you must combine it to the attributes of one or more form(s). Attribute values are the dynamic part of a document template. The dynamic part is essential to a document template because it allows it to be adapted to any situation.

Indeed, if we take our example again, it is likely that each invitation has a different date, location and recipient. Thus, the attribute values allows you to **personalize** every document template.

Before combining a document template with a form, you must first create a form in the same database as the document template.

The creation of a dynamic document template requires two actions:

- Creation of tags related to the attributes of the selected form(s);
- The incorporation of the form attribute tags in the document template, in Word.

To create the tags related to the attribute of one or more form(s):

1. Check the form(s) whose attributes will be added in the document template, in the **Forms** table.
2. Click on the button to display the attributes of the selected form.
3. Double click on the attribute of your choice.

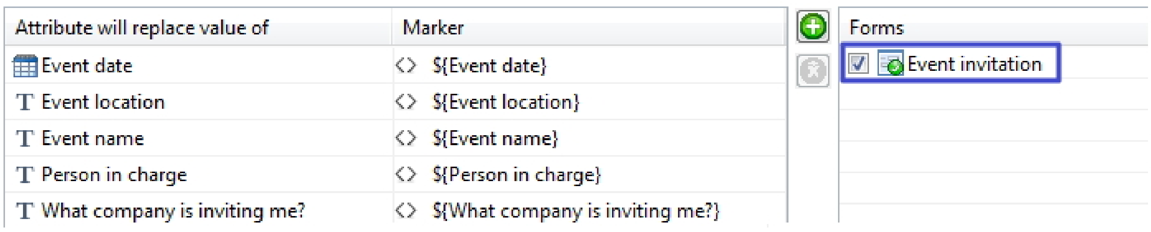
   The attribute is now displayed in the **Content** table, with its associated tag.

4. Repeat this operation for every attribute you want to add in your document template.

5. Click on **Apply** once you have added all the desired attributes.

   You have created the tags related to the attributes of one or more form(s).

In the case of our example, this is what it would look like:



To incorporate the attribute tags in a document template:

1. Select the tag corresponding to an attribute, in the **Content** table.
2. Copy the tag.
3. Paste the tag in the document template, in Word, in place of the static text that you want to turn into a dynamic text.
4. Repeat this operation for all the tags.
5. Save the document template.
6. Import your document template once again in the Administration tool, following this procedure (starting from the fifth step).

   You have incorporated the attribute tags in a document template.

In the case of our example, this is what it would look like for the acceptance of an invitation:

SIATEL France

12, rue de Paris, Paris

01.66.66.66.66

${What company is inviting me?}

20 avenue du Général de Gaulle, Rouen

01.77.77.77.77

Subject: About your invitation

Mr. ${Person in charge},

We have the pleasure to accept your invitation related to ${Event name}, on the ${Event date}, in ${Event location}.

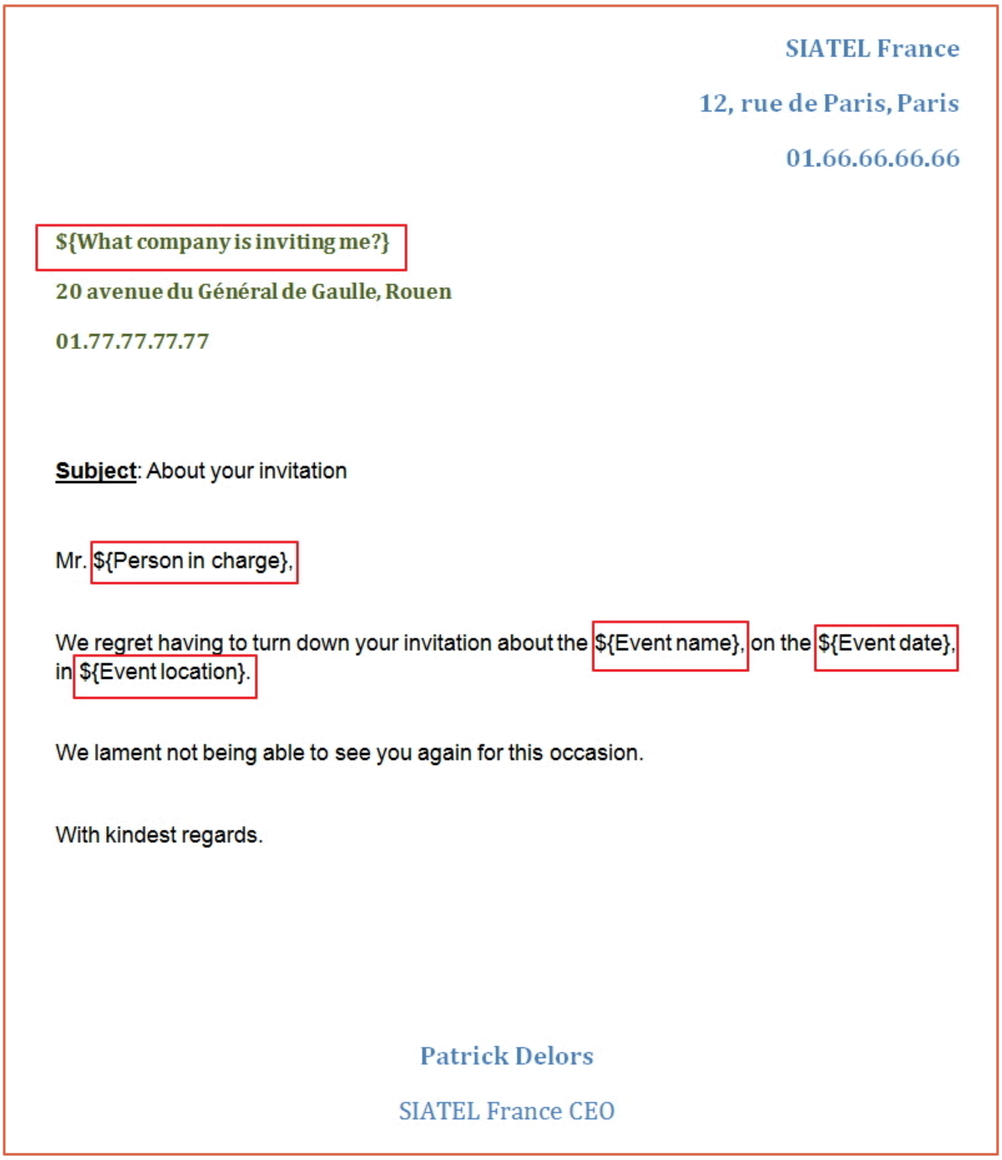
We are looking forward to seeing you again for this occasion.

With kindest regards.

Patrick Delors

SIATEL France CEO

And for the refusal:



SIATEL France

12, rue de Paris, Paris

01.66.66.66.66

${What company is inviting me?}

20 avenue du Général de Gaulle, Rouen

01.77.77.77.77

Subject: About your invitation

Mr. ${Person in charge},

We regret having to turn down your invitation about the ${Event name}, on the ${Event date}, in ${Event location}.

We lament not being able to see you again for this occasion.

With kindest regards.

Patrick Delors

SIATEL France CEO

Your document template is now ready to be implemented in a process.

Enabling translations

If you did not enable translations when creating the document template in the Administration tool, you can still do it once it has been created.

To enable translations for a document template:

1. Open the document template in which you want to enable translations.

   The configuration screen of the document template is displayed in the right pane.

2. Check the **Enable translations** checkbox.

   The flags of the available languages are displayed under the checkbox, and replace the File field.

   You have enabled translations for a document template.

You can now:

- Click on each flag, to add translations in the languages of your choice;
- Right-click on a flag, to copy the document template of a language to another one, or to any language for which the document template has not been defined;
- Use the arrow of the Reset button to choose the document template(s) in the language(s) of your choice that you want to delete.

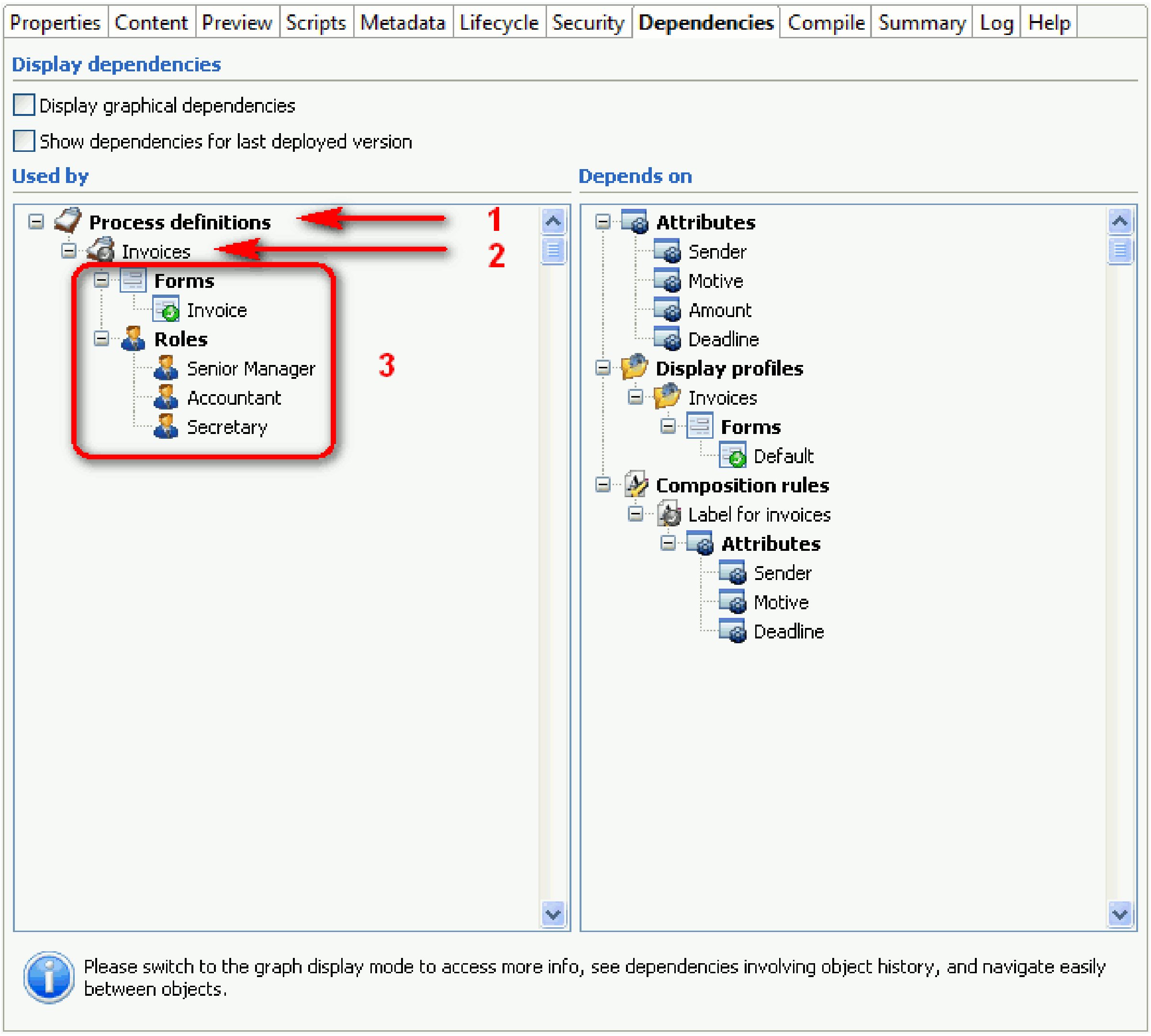
"DEPENDENCIES" TAB

The **Dependencies** tab allows you to know which other objects rely on or are used by the current design object.

DISPLAYING DEPENDENCIES IN LIST MODE

By default, dependencies are displayed in **list mode** and the **working copies** of the objects are taken into account.

Depending on whether the current object is used by and/or relies on other objects, dependencies are displayed in 1 or 2 columns. If there are 2, the objects that rely on the current object are listed in the left column, and the objects that are used by the current object appear in the right column:



1. Some objects in this category have dependencies to the current object.
2. This object has a dependency to the current object, that is the "Invoices" process uses the "Invoice"

form.

3. Here is the list of all objects that have a dependency to the “Invoices” process.

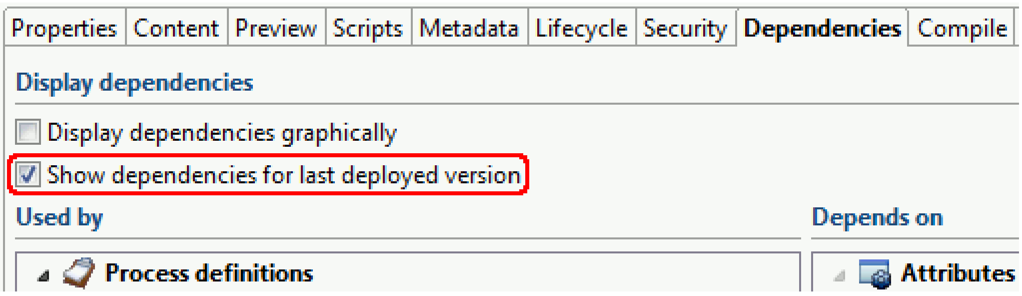
In the dependencies analysis screens as well as everywhere else in the interface, the icon indicates whether an object is currently deployed and, if so, whether the deployed version is identical to the working copy:

- No icon - The object is not deployed.
- - The object is deployed and there is no difference between its last deployed version and its working copy.
- - The object is deployed but its last deployed version is not identical to its working copy.

What is the “Show dependencies for last deployed version” option for?

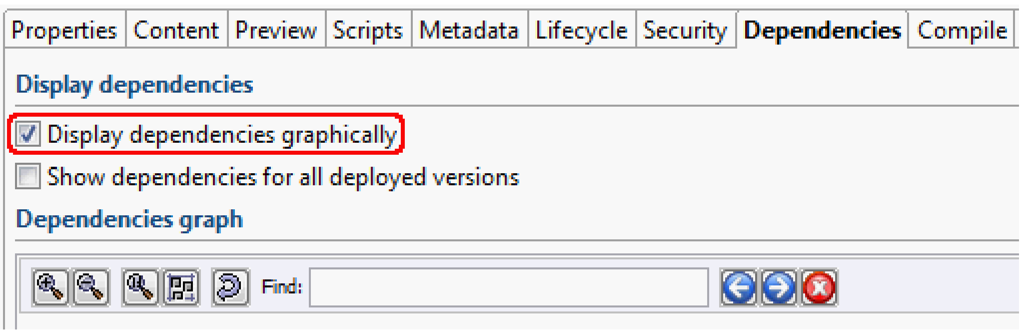
By checking the **Show dependencies for last deployed version** checkbox, you can choose to display the dependencies for the version of the object that is currently deployed, instead of the dependencies for the working copy.

This option is only available in list mode, for objects that support the **Deployment history** feature:

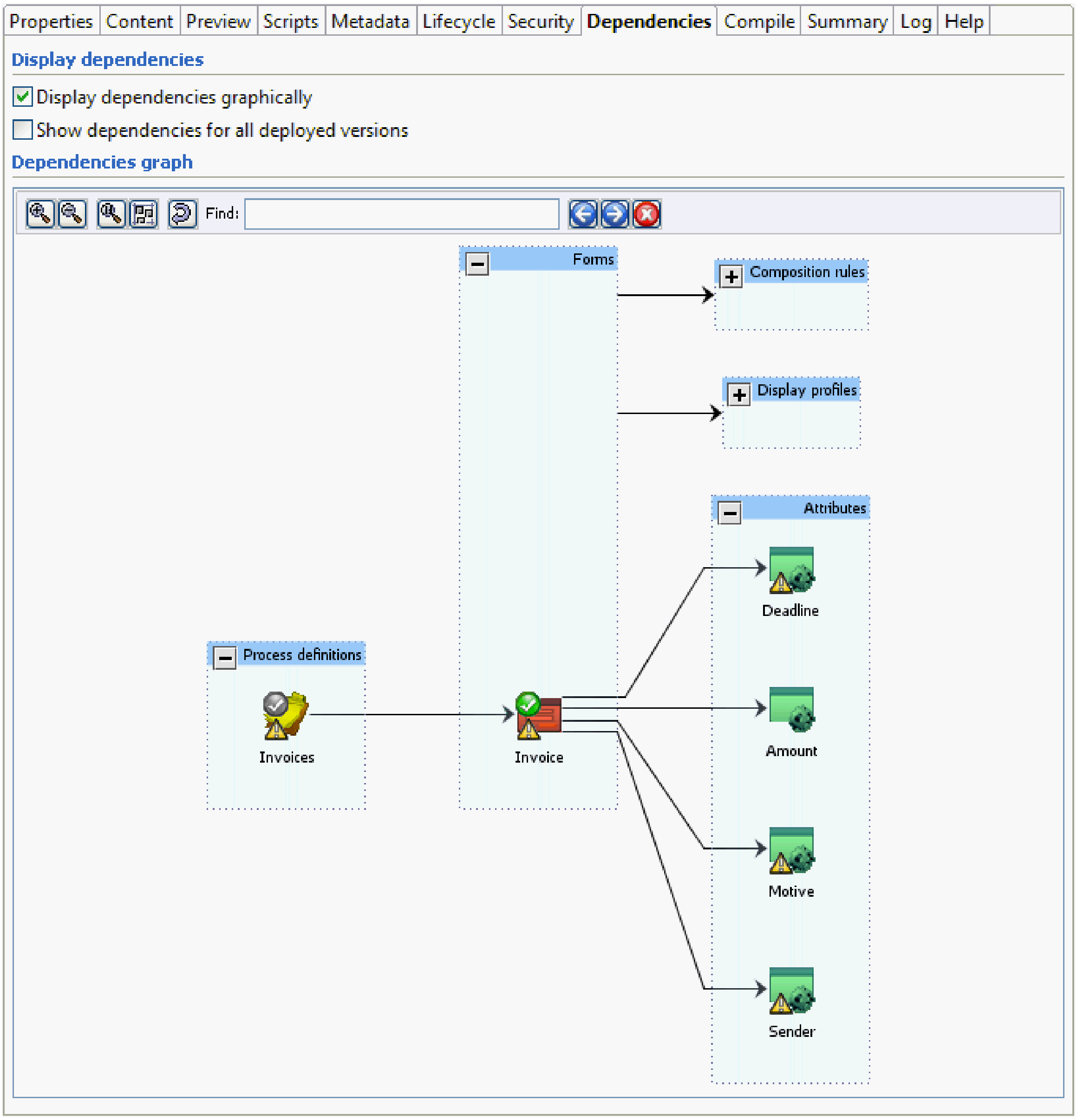


Displaying dependencies graphically

In order to switch from the list mode to the graphical display, check the **Display dependencies graphically** option:



The dependencies between the working copies of the various objects now take the form of a graph:



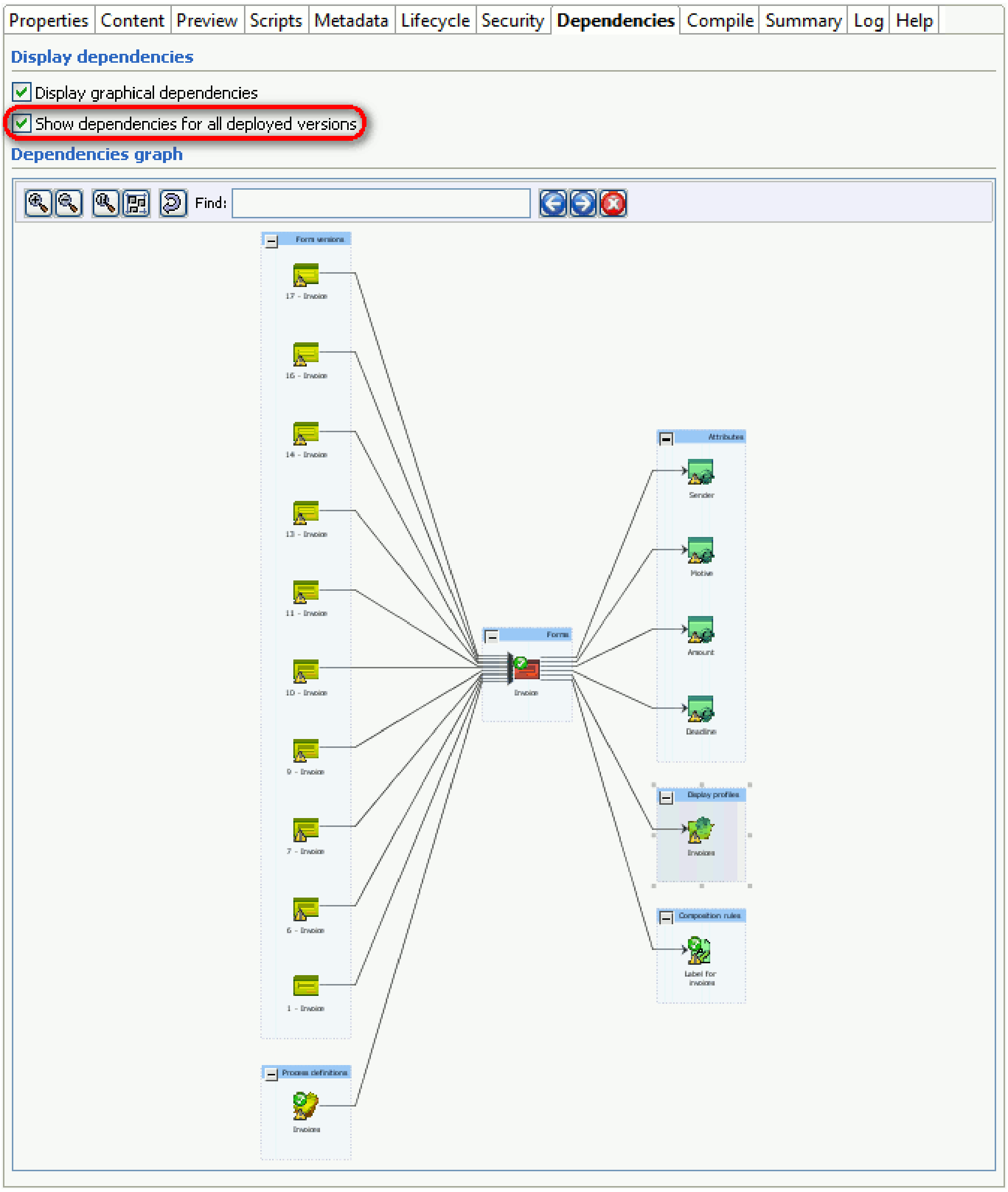
The toolbar above the graph allows you to:

- - Enlarge the graph;
- - Make the graph smaller;
- - Restore the default size for the graph;
- - Optimize the size of the graph;
- - Refresh the graph;
- Find: - Search the names of the objects in the graph for a particular string; the objects that match the search criterion are highlighted in pale blue;
- - - Navigate between the objects that contain the search string;
- - Reset the search results so that no more objects are highlighted.

What is the "Show dependencies for all deployed versions" option for?

If you check the **Show dependencies for all deployed versions** box, the dependencies graph will include all previously deployed versions of the objects, instead of just their working copies. If the current object supports the **Deployment history** function, then the list of all its previously deployed versions will also appear in the graph.

This option is only available when dependencies are displayed graphically:



“Summary” tab

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the Gargantua Administration tool.

“Log” tab

The **Log** tab allows you to view a list of all the operations performed in one of the branches of Gargantua Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **“Week audits”**, **“Month audits”**, **“Year audits”** and **“All audits”** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.

3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

> *You can tick the **"Show login/logout events"** box to display the users connections and disconnections. This functionality is only available for the **"Users"** and **"Server log"** branches.*
>
> *You can tick the **"Only Show error audits box"** to only display the failed operations.*

> *The **"Reset"** button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

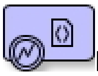
To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

Implementing a document template in a process

Now that you have properly configured your document template, there is one step left: implementing it within a process. This implementation first begins by adding a **Document template task**, then by uniting the latter to a document template that you have previously created.

To implement a document template in a process:

1. Open the **Process** branch of your database.
2. Sketch the desired process (for more information, check the chapter dedicated to processes).
3. Add a **Document template task** with the help of the  button.
4. Double click on the task you have just created, to configure it.
5. Name the task, add a description (optional).
6. Check the desired document template checkbox, in the **Document template** field.

   A drop-down list is now displayed in the **Form** field. This drop-down list shows, depending on the chosen document template, the various forms that you created earlier.

7. Click on the arrow to show the forms created with the document template.
8. Click on the form of your choice.

   The form that you have chosen is now displayed in the **Form** field.

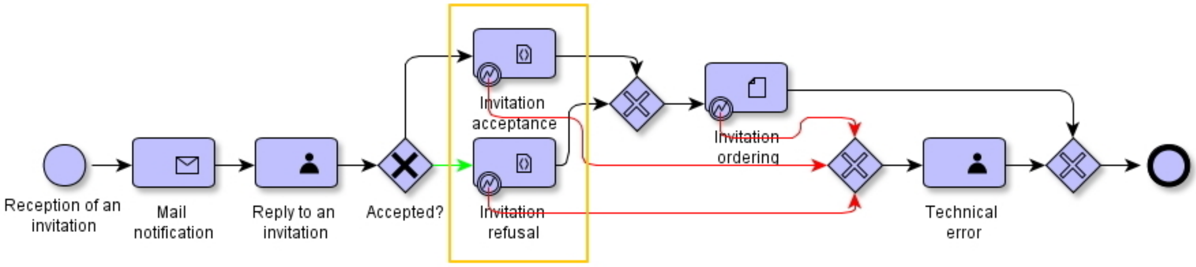
9. Check potentially the following checkboxes :
   -  **Copy attributes** : all the form attribute values attached to the document template will be displayed on the left explorer pane, beside the document template.
   -  **Copy only attributes from document template** : only the attribute values included in the document template will be displayed on the left explorer pane, beside the document template.

   > *If you do not check the checkboxes, the attribute values will not be displayed in the explorer.*

10. Click on **OK** to validate.
11. Match the **Document template task** to the other tasks, according to your needs.

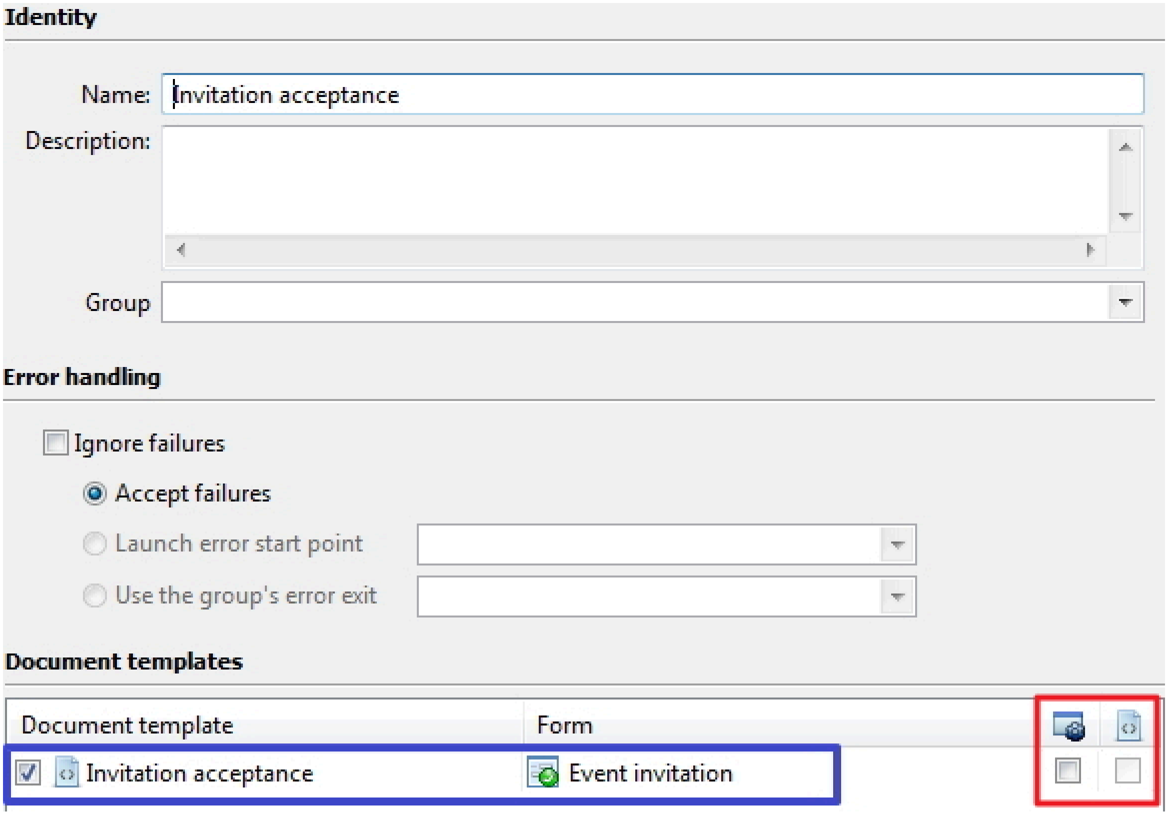
    You have implemented a document template in a process.

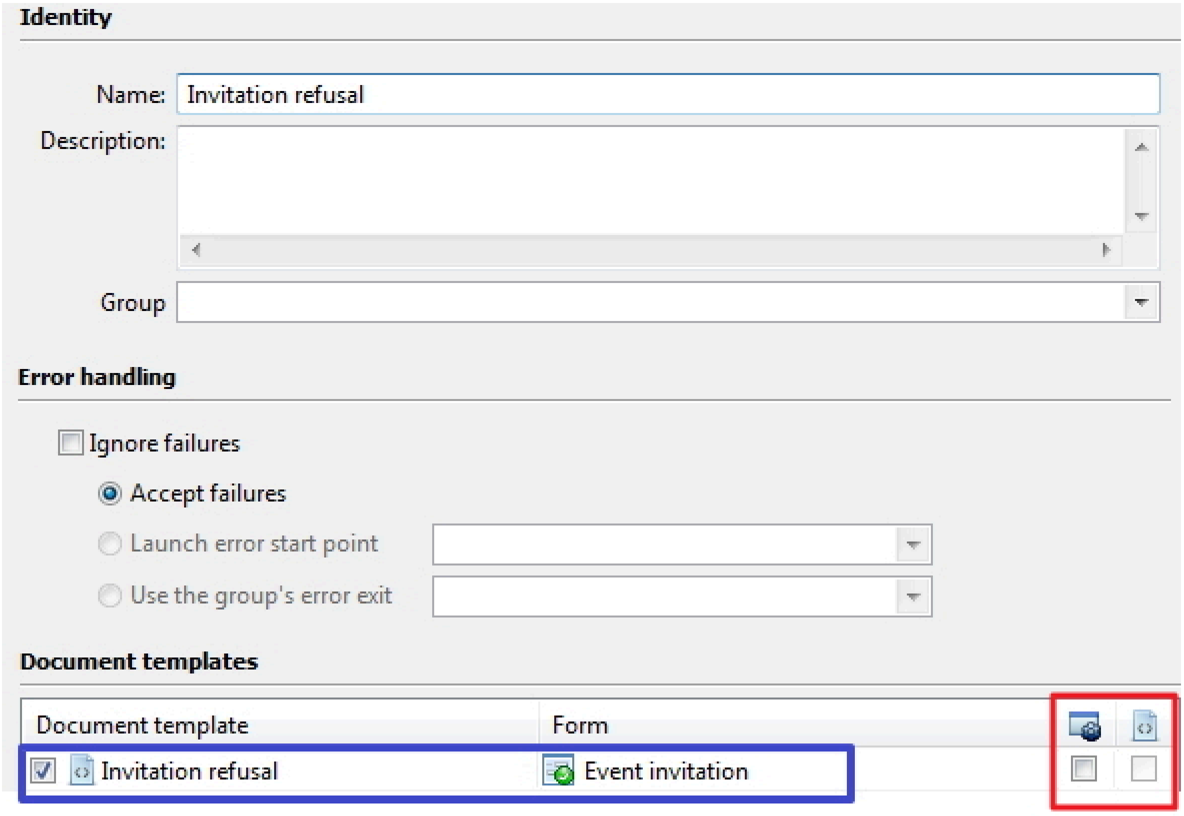
Below are the **Document template tasks** implemented in our example process:



Document template tasks

And now the configuration screen of the two tasks (acceptance then refusal):




Identity
Name: Invitation refusal
Description:
Group
Error handling
Ignore failures
Accept failures
Launch error start point
Use the group's error exit
Document templates
Document template
Form
Invitation refusal
Event invitation

Duplicating a document template

To duplicate a document template:

1. Open a document template, in the Administration tool.
2. Click on **Duplicate**.

   A new document template named “xxx **(1)**” is shown in the left pane of the Administration tool. The corresponding management screen is displayed in the right pane. You have duplicated a document template.

Deleting a document template

To delete a document template:

1. Open the document template, in the Administration tool.
2. Click on **Delete**.

   You have deleted a document template.

Final result

Below is the final result, in the Web Client, in the case of an acceptance:

SIATEL France

12, rue de Paris, Paris

01.66.66.66.66

IBM

20 avenue du Général de Gaulle, Rouen

01.77.77.77.77

Subject: About your invitation

Mr. Peter Quinn

We have the pleasure to accept your invitation related to celebration of our collaboration, on the 15/03/2015, in La Défense

We are looking forward to seeing you again for this occasion.

With kindest regards.

Patrick Delors

SIATEL France CEO

And in the case of a refusal:

SIATEL France

12, rue de Paris, Paris

01.66.66.66.66

IBM

20 avenue du Général de Gaulle, Rouen

01.77.77.77.77

Subject: About your invitation

Mr. Peter Quinn,

We regret having to turn down your invitation about the celebration of our collaboration, on the 15/03/2015, in La Défense.

We lament not being able to see you again for this occasion.

With kindest regards.

Patrick Delors

SIATEL France CEO