

## Document Design Script

\*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

**Before you begin:** Prepare a logo file in shades of blue+grey

Clip Link: [http://www.priority-software.com/eshbel.com/Movie\\_Search/Document\\_Design\\_clip.htm](http://www.priority-software.com/eshbel.com/Movie_Search/Document_Design_clip.htm)

Note: Yellow highlights indicate action instructions.

### Introduction (00:00-00:41)

In this presentation we will demonstrate several tools that are used to design HTML documents and reports generated in **Priority**, such as changing colors to adjust the look and feel of documents, changing the color and look of fonts, changing or hiding column names, and changing the date format that appears in the document.

Only users with the appropriate permissions have access to design options; if you lack such permissions, consult your system manager.

We'll start by defining the company logo that will appear on all system documents, as well as a personalized signature that will appear on any documents that you generate.

### Add a Logo to System Documents (00:42-01:53)

We recommend that you use a .JPG or .GIF file format for your company logo, and that you import this file into **Priority**, where it can be accessed by all system users.

If you work with multiple companies, affiliates and/or branches in **Priority**, you can import a separate logo for each, in the relevant form. Let's **enter the Company Data form** **[MENU PATH: System Management > System Maintenance > Companies]** and define a logo for any documents produced for the current company environment, International Demo Company **[POINT OUT COMPANY NAME AT TOP OF MAIN MENU]**. **Move the cursor to the HTML Logo column, right-click on the paperclip icon and select Import.** In the dialog box that opens, locate your logo file and click **Open**.

You can switch to a different company environment and repeat this process **[OPEN File MENU AND POINT TO Select Company OPTION]** to add a logo for a different company. You can also add separate logo files for specific affiliates or branches in the **Affiliates** or **Branches** forms, respectively. These alternate logos will then appear on any documents that are linked to the branch or affiliate in question.

### Add a User Signature for Document Printouts (01:45-02:39)

Next, we're going to customize the user signature that appears in any documents you generate. **From the upper File menu, select the User Signature command. In the parameter input screen that opens, we'll choose to define the signature that will appear in Documents.**

A second parameter input screen appears, in which you can compose a personal greeting **[Opening Text = "Sincerely"]** and indicate which elements you want to display in

your signature[FLAG Name, Position, Company, E-mail Address]. Most of the elements in this screen correspond to a parallel column in your personnel file (e.g., your name and job title).



Next, we'll look at a few general definitions that apply to all reports and documents, system-wide, and then we'll set up some custom definitions for an individual document.

### Report Design Tool (02:40-07:00)

We will now demonstrate the design functionality in a specific document. In this example, we'll design the **Order Confirmation** document, but the same principles apply to various reports and documents throughout the system. The report customizations we are about to make will affect all users in all companies in the system.

Let's go to the **Sales** menu, **Orders, Sales Order Reports, Order Confirmations** and locate the program used to print an **Order Confirmation**. Right-click this print program and select **Design Report**. You can see a list of all print formats that have been defined for the document, such as the predefined Standard Format. Each of the predefined print formats comprises a different set of document components. Now, rather than modify an existing format, we're going to duplicate the Standard Format and make our changes in the duplicate format. This is a good practice to adopt, as it may prevent you from having to reconstruct the original design, if it is needed at some later date. So, let's right-click the format title, select **Duplicate**, and then assign the desired format title["Demo"].

Next, we'll open the new print format[CLICK THE ARROW] to view a list of document sections. While some reports consist of a single section composed of the relevant columns, most documents, such as this one, contain a number of sections.

Some sections are pre-designed in a fixed style[POINT TO THE  ICON NEXT TO ANY SECTION], and you cannot rearrange their columns. Those sections without a fixed style appear as tables[POINT TO THE  ICON NEXT TO ANY SECTION], and their columns can be rearranged.

Click the arrow next to any section title to view its component columns. We'll open one without a fixed style[e.g., **Order Items**], and use the up and down arrows on the right to rearrange the columns. You can also right-click any column in order to hide or rename it. Hidden columns are indicated by a red X[POINT]. To display a hidden column, right-click the column and select **Show**.

In addition, you can revise the appearance of document fields and their titles. Right-click the desired field and select **Field Attributes** to open a dialog box in which you can change the field's font, font style, font size, color, background color or alignment in the space assigned to the field.

Different types of fields may also present other options. For instance, in fields that contain a number, such as **Packing Crates (No.)**[RIGHT-CLICK AND SELECT **Field Attributes**], you can also set the number of decimal places to display or choose to color negative values. In a date field, such as **Due Date**[RIGHT-CLICK AND SELECT **Field Attributes**], you can choose the desired **Date Format**. In text fields in an itemized document, such as **Part Description**[RIGHT-CLICK AND SELECT **Field Attributes**], you can also determine

whether text for a given item will be broken automatically into more than one line if it exceeds the column width. This is the default setting, but can be changed by **flagging the Prevent Line Break attribute**.

Right-click the desired field and select **Title Attributes** to open a dialog box in which you can change the column title's font, font style, font color, background color or text justification.

To undo all changes to the report's appearance, **right-click the format title** and select **Restore Defaults**[POINT].

### Change the Color Scheme of Printouts (07:01-10:19)

When you first begin producing documents and reports in **Priority**, you'll notice that they appear on a cream and brown background and that the default font color is black. However, you may want to change the standard color scheme of all printouts in your organization; for instance, to match your company's logo.

To change the background color, **go to the System Management > System Maintenance > Advanced Design menu and open the Color Definitions form**. In this form, you can change the RGB definitions used in any section of the printout, either for the background or for the font itself. For instance, let's revise the background color of sections that are currently set to appear with a cream-colored background[Bkgd Color: Form's Line Text; Bkgd Color: Form's Totals; Bkgd Color: Form's Totals Title], so that they appear with a white background, instead[RGB = 255;255;255]. And next we'll define sections that currently have a darker cream background[Bkgd Color: Form's Header Data; Bkgd Color: Form's End Remarks] so that they appear with a grey background instead[RGB = 192;192;192].

Finally, let's change the font color used for the report title[Font Color: Report Title] to dark blue[RGB = 66;66;111].

You can also set color definitions to be used solely within a specific company. For instance, if you want to use a green font for the report title only when working in the Demo Company, which is our current company environment[POINT OUT COMPANY NAME AT TOP OF MAIN MENU], **use the Company-Specific Color Definitn sub-level form** to set the RGB definitions used in this company[RGB = 0;100;0].

When you finish defining the desired color scheme, run the **Create HTML Pages for Documents** program[FROM THE Design Programs SUB-MENU OF THE OPEN Advanced Design MENU] in order to implement your changes in all document templates (e.g., price quotations, sales orders).

### Change the Font Used for Printouts (10:20-11:46)

You can also change the font face and size, if desired. By default, all system documents and reports are defined with the **Font** Arial and the **Size** 2 (other than the "Report Title" section, which should have a **Size** of 3).

To change the font definitions for the body of all system reports or documents, **enter the Font and Color Defaults form**[FROM THE Advanced Design MENU] and move to the row

for **Line**. Place the cursor in the **Font Name** column and press **F6** twice to enter the **Font Definitions** form and make the desired changes to the font face and size.

You can also set special font definitions for a specific company in the **Company-Specific Font Definition** sub-level form. For instance, let's use the Verdana font [RECORD "Verdana" IN THE Font COLUMN] for any reports and documents generated for the International Demo Company, which is our current company environment [POINT OUT COMPANY NAME AT TOP OF MAIN MENU].

Press **Esc** to return to the **Font Definitions** form, and then press **Esc** again to return to the **Font and Color Defaults** form. And now we'll move to the line for **Line2** and repeat the procedure for this report element as well [PLACE CURSOR IN THE **Font Name** COLUMN, PRESS **F6** TWICE TO ENTER THE **Font Definitions** FORM, MOVE TO SUB-LEVEL FORM AND RECORD "Verdana"].

This concludes our explanation of report and document design in *Priority*.

### Related Documentation

- User Interface Guide
- Printing Wizard