

# BLUE CHAMELEON : Advanced Functions and Configuring : The Document Editor

*For links outside this document,*

*download the relevant chapter or the **Blue Chameleon Full Documentation**.*

December 19, 2013



# Appendix D

## The Document Editor

Blue Chameleon integrates a document editor which provides the most useful functionalities of a word processor : text formatting, table and image insertion,... It is used in the context of writing paper creation for invoices, Customer Relationship Manager campaigns and mailings.

### D.1 General use

General use of Blue Chameleon's Document Editor, which view is featured at Fig.D.1, is pretty similar with that of other word processors.

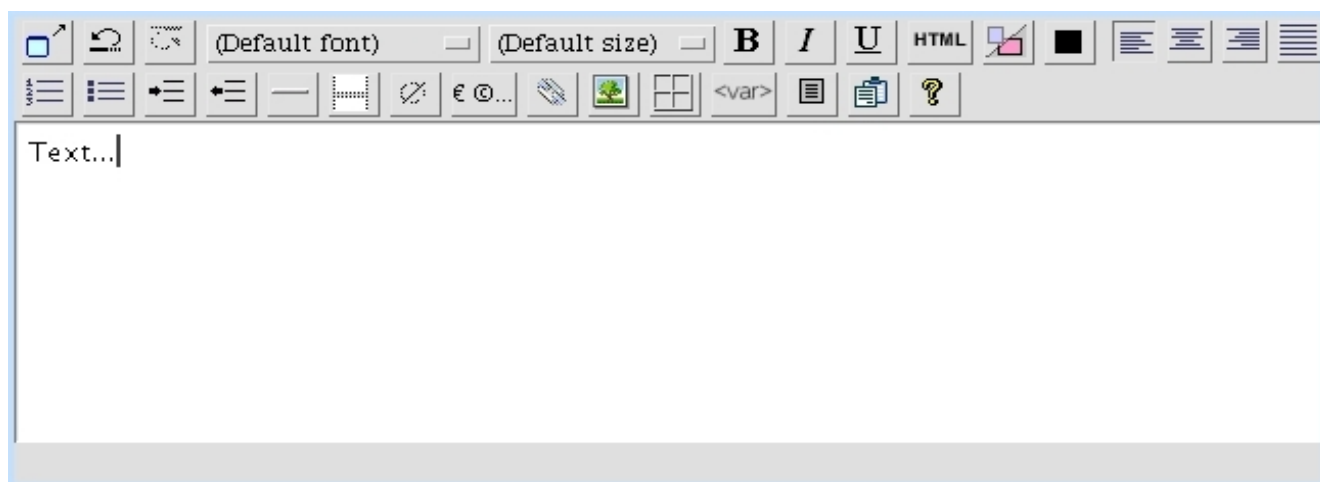




Figure D.1: The Document Editor.

The Editor window can be put in full screen with  ; normal mode is switched back on again with the same button.

#### D.1.1 Edition : undo, copy, paste...

In order to undo the last keystroke or operation, click on  ; redoing a canceled keystroke or operation is then achieved via . Usual keyboard shortcuts for these,

respectively Ctrl+Z and Ctrl+Y, are also functional.

Copying or cutting are done by selecting the object to operate on (highlighting a text (Fig.D.2), selecting a table (Fig.D.11)), doing a right click and clicking on **Copy** or **Cut**. Once copied, an element can be pasted via a right-click and **Paste**.

To paste text from another application, click on **Paste** as found in the menu : then, on subsequent pop-up, paste your text via a Ctrl+V and validate by **paste to applet**.

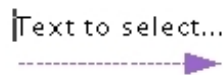
## D.1.2 Text

How text in the Editor is dealt with in any possible way is described below.

### D.1.2.1 Highlighting text

As illustrated on Fig.D.2, in order to operate on a piece of text (copying, cutting, moving...), it is necessary to highlight it by positioning cursor in front of it, holding left mouse button and dragging across the text.

hold left mouse button, and drag across text :



...text is highlighted and thus selected.

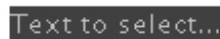


Figure D.2: Highlighting text.

### D.1.2.2 Font and font size

The font of inputed or highlighted text is chosen via the **(Default font)**  button, which then takes the name of selected font from the following choices as available in Fig.D.3.

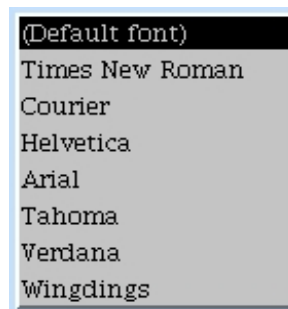


Figure D.3: List of the Editor's available fonts.

Font size of inputed or highlighted text, as chosen from **(Default size)**, ranges from :

- sizes from 6 to 16 points (by increments of 2) ;
- default size minus 7 to plus 7 ;
- Headings from 1 to 6 ;
- HTML from 1 to 7.

### D.1.2.3 Font style

Inputed or highlighted text is emboldened, slanted and underlined via respectively **B**, **I** and **U**.

### D.1.2.4 Font color

Font color of inputed or highlighted text can be chosen via **■**, as displayed on Fig.D.4 ; on the then displaying pop-up window, color can be picked on a palette, or be entered RGB- or hexadecimal- wise via **Other colors...**.

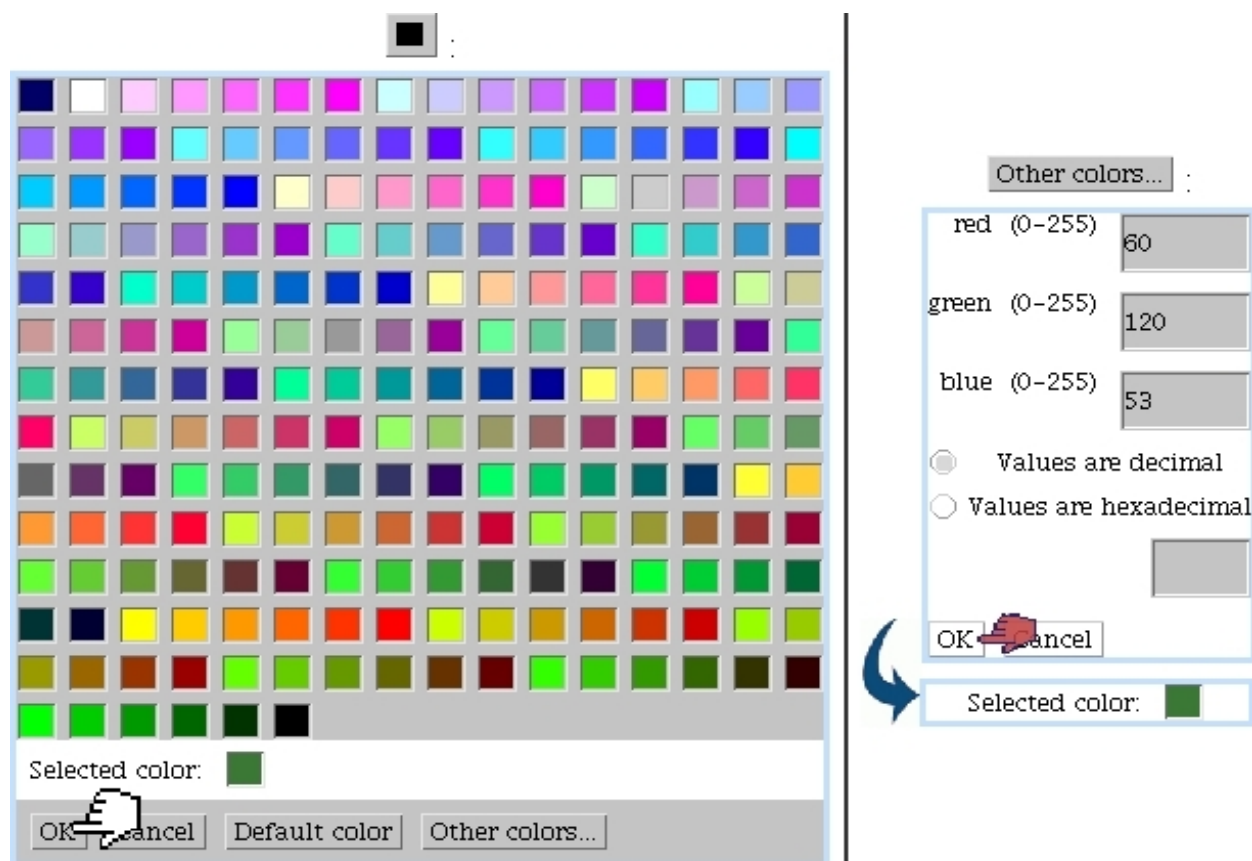


Figure D.4: Creating and selecting a custom color.

### D.1.2.5 Alignment and indentation

Inputed or highlighted text can be left-aligned, right-aligned, centered and justified via respectively , ,  and .

Indented or unindentation is achieved via respectively  and .

### D.1.2.6 Special characters




As represented on Fig.D.5, they are accessible via .



Figure D.5: Available special characters.


The last used special character added can be directly added again by clicking on the  icon, which takes the appearance of that character.


### D.1.2.7 Miscellaneous

A horizontal bar, spanning over the whole page, can be added via .

Forcing a page break on a generated PDF can be achieved with .

### D.1.2.8 HTML code and comments

The Document Editor gives you the possibility, if needed, to input some HTML code (or label highlighted text as so) via .

Also, by clicking , inputed or highlighted text is marked as comment (and thus appears on a grey background) and will not appear on the final document.

### D.1.2.9 Hyperlinks

Should it be needed, as, featured on Fig.D.6, text can be highlighted and transformed into a clickable link (e.g. to link to a webpage) ; this applies for electronic campaigns (7.9.8).

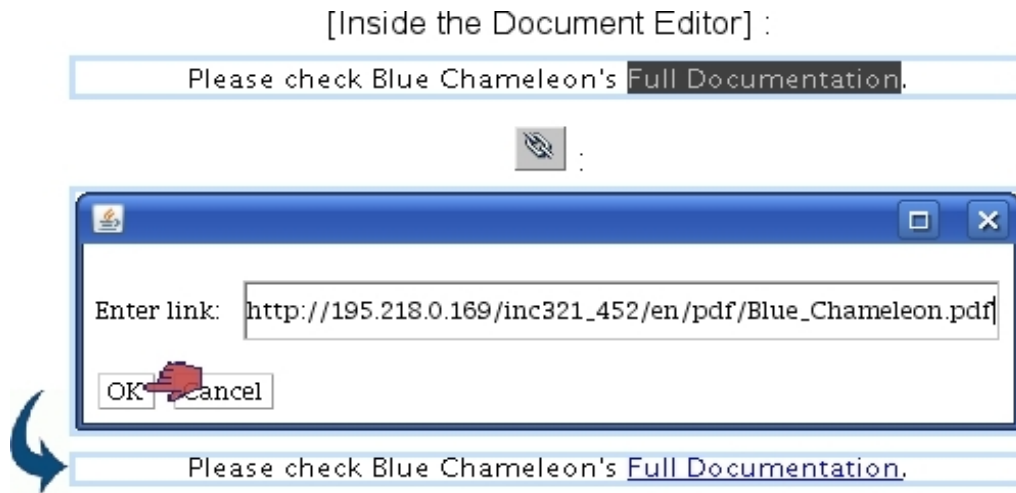




Figure D.6: This bit of text, when related document will be dispatched as an electronic campaign, is clickable and leads to the entered website.

### D.1.3 Lists

Bulleted lists and enumerated lists can be entered via respectively  and . As Fig.D.7 shows with the example of an enumerated list, next item of the list is entered by hitting Enter ; to do a line feed without creating a new list item, hit Shift+Enter.

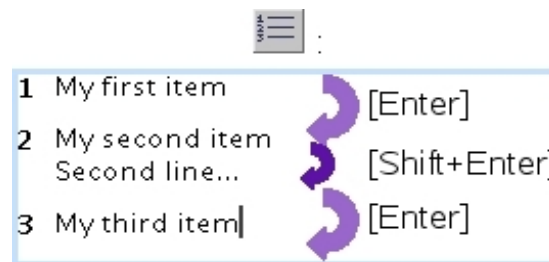


Figure D.7: Creating an enumerated list.




Fig.D.8 now shows how to build complex plans with embedded sections. The  icon is clicked on as many times as needed to get the aimed number, in this example three times to get **1.1.1**. Hitting Enter then creates the **1.1.2** part. Hitting Enter again, *then* , tells that this (temporary) part **1.1.3** is in fact a subdivision of the part above, and thus the **1.1.2.1** is created.

Fig.D.9 finally shows how go up in the plan's hierarchy. Enter is hit, then Backspace is hit as many times as needed to get to the "bigger" parts : twice in this example, to shift (temporary) **1.1.2.3** to **1.2**.

### D.1.4 Tables

A table is added via  ; on subsequent pop-up, as displayed on Fig.D.10, numbers of rows and columns are chosen. Table is then displayed in the Editor and cursor can be



 [Thrice] :  
**1.1.1** Sub-sub-section|  
 [Hit Enter] :  
**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section|  
 [Enter] and  once :  
**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section  
     **1.1.2.1** Paragraph|




Figure D.8: An example on how to use the advanced plan possibilities.

**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section  
     **1.1.2.1** ...  
     **1.1.2.2** ...|  
 [Enter] and [Backspace] twice :  
**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section  
     **1.1.2.1** ...  
     **1.1.2.2** ...  
**1.2** |

Figure D.9: How to climb up the plan's hierarchy.

placed in a cell via a single left click of the mouse.

#### D.1.4.1 Selecting a whole table vs. selecting cells

In order to copy/paste/cut a table or align it (with , , ) , it has to be selected as a whole, in the way described at Fig.D.11 : position cursor on its left side, hold left mouse button and drag across the table. All cells of the now-selected table are highlighted, *plus a little width on its left side*.

This serves to make a distinction to the case where all the cells are selected, not the table.



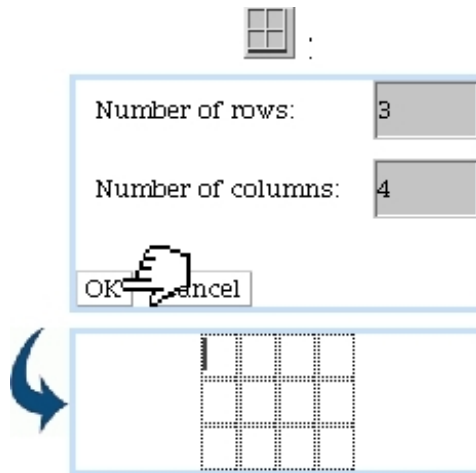


Figure D.10: Inserting a table of 3 rows and 4 columns.

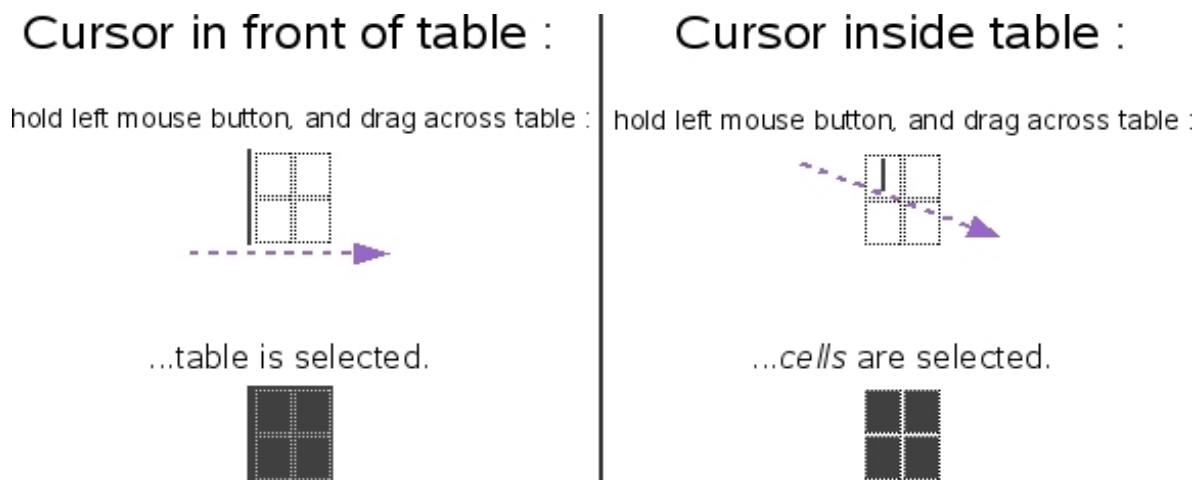


Figure D.11: How to select an entire table to operate on it (alignment, copying,...) and how to select cells

#### D.1.4.2 Table properties

As featured on Fig.D.12, table properties can be edited as cursor is anywhere in the table via a right-click, by selecting **Table** > / **Table properties**.

There, the table alignment is chosen. Also, numerical values can be filled/chosen for the following :

- table width/height, which can be given in pixels (eg. 300) or percentage of the width/height of the page (eg. 50%) ;
- border of the table, though for practical use, a dedicated functionality exists (D.1.4.4)
- space between cells, given in pixels ;
- space around cell text, given in pixels.

If you do not want to set one or several of those values, leave them blank.

[right click in table]

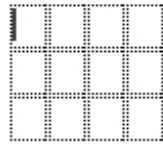


Table ▶ / Table properties :

Alignment of the table:

left  center  right

Table width:

Table height:

Border of the table:

Space between cells (CELLSPACING):

Space around cell text (CELLPADDING):

OK Cancel

Figure D.12: This window allows to set table properties.

### D.1.4.3 Cell properties

As featured on Fig.D.13, via a right click and **Table ▶ / Cell properties**, it is possible to edit the properties of a single cell or a group of cells, which are highlighted by holding left mouse button and selecting them.

Horizontal and vertical alignment of text in the cell(s) can there be chosen, as well as the width/height of the cell(s) in pixels (eg. 20) or in percentage of the width/height of the table (eg. 10%). Also, the size of the cell border in pixels can be set either for the whole cell or for each of the four borders by unchecking 'Same widths' (D.1.4.3.2).

A wrap text option is also available, and so is the choice for background and border colors (which can be set for each of the four borders by unchecking 'Same border colors', D.1.4.3.3), selected in a similar way as in Fig.D.4.

**D.1.4.3.1 Merging cells** Merging cells is done as featured on Fig.D.14, via a right click on selected cells to merge and **Table ▶ / Merge selected cells**.

To split a merged cell, put cursor in it and via a right click, follow **Table ▶ / Split selected cell**.

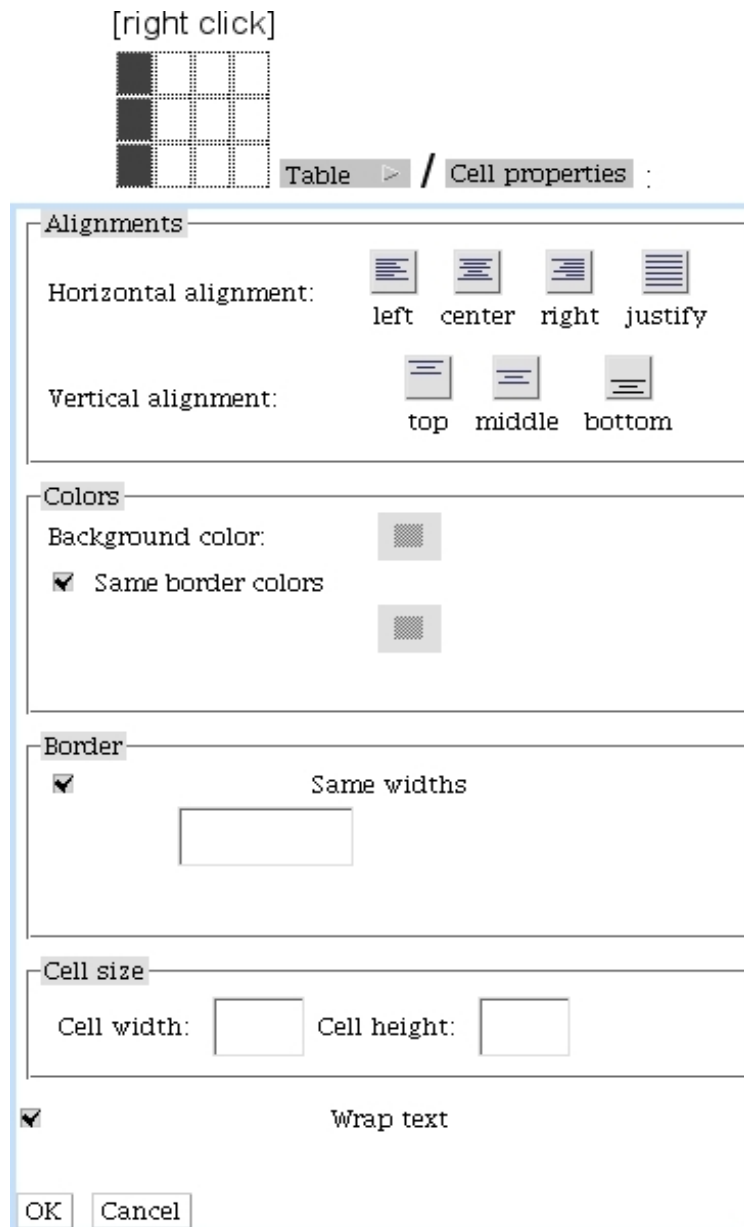


Figure D.13: This window allows to set cell properties.

**D.1.4.3.2 Removing the borders of cells** With the possibility to edit the borders of cells (individually and in group), the Document Editor's functionalities allows to create tables that are shaped to your very needs.

For instance, Fig.D.15 shows how to remove the outer borders in one cell of a table which had been set with even inner and outer borders (D.1.4.4).

**D.1.4.3.3 Cell coloring** Fig.D.16 shows how it is possible to set various colors for a specific cell.

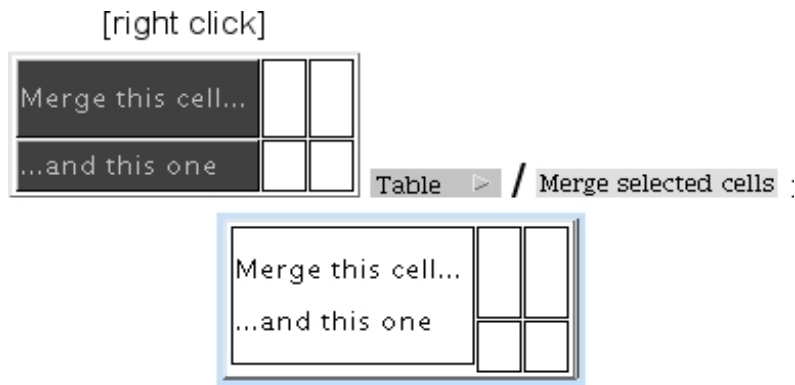
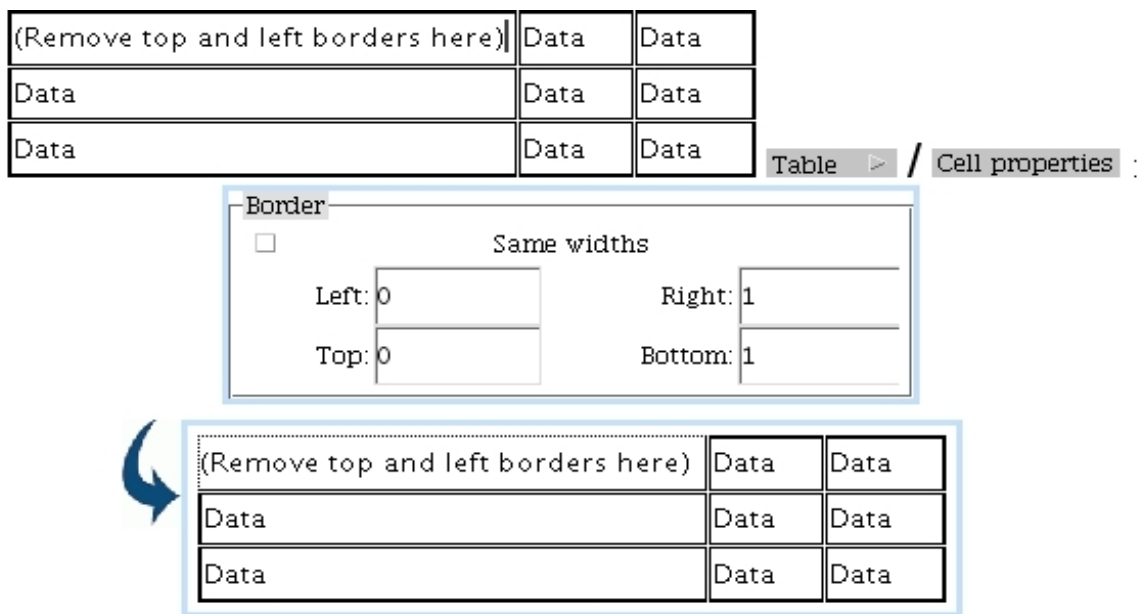


Figure D.14: Merging a table's cells.



[Result on generated PDF] :

(Remove top and left borders here)	Data	Data
Data	Data	Data
Data	Data	Data

Figure D.15: Removing the outer borders of one cell.

#### D.1.4.4 Borders

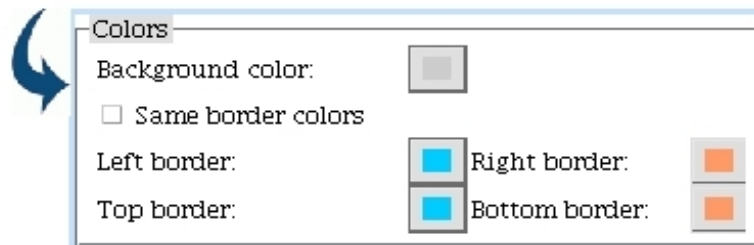
Figs.D.17, D.18 and D.19 show how even widths for borders can be achieved, as well as making only outer or inner ones appear.

Color cell : blue (top, left) and orange (bottom, right) grey background	Data	Data
Data	Data	Data
Data	Data	Data

Table > / Cell properties :



[After background and border colors have been chosen] :



Color cell : blue (top, left) and orange (bottom, right) grey background	Data	Data
Data	Data	Data
Data	Data	Data

[Result on generated PDF] :

Color cell : blue (top, left) and orange (bottom, right) grey background	Data	Data
Data	Data	Data
Data	Data	Data

Figure D.16: Putting custom colors on the borders and background of a table cell.



*These can be achieved for any number of cells inside the table.*

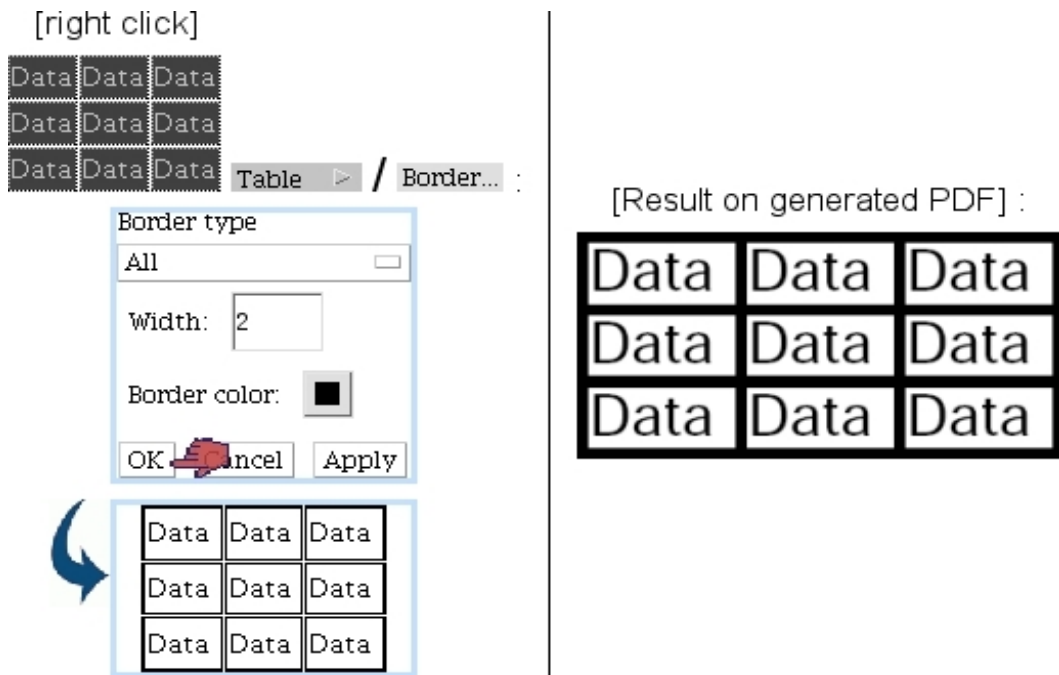


Figure D.17: Creating a table with even inner and outer borders.

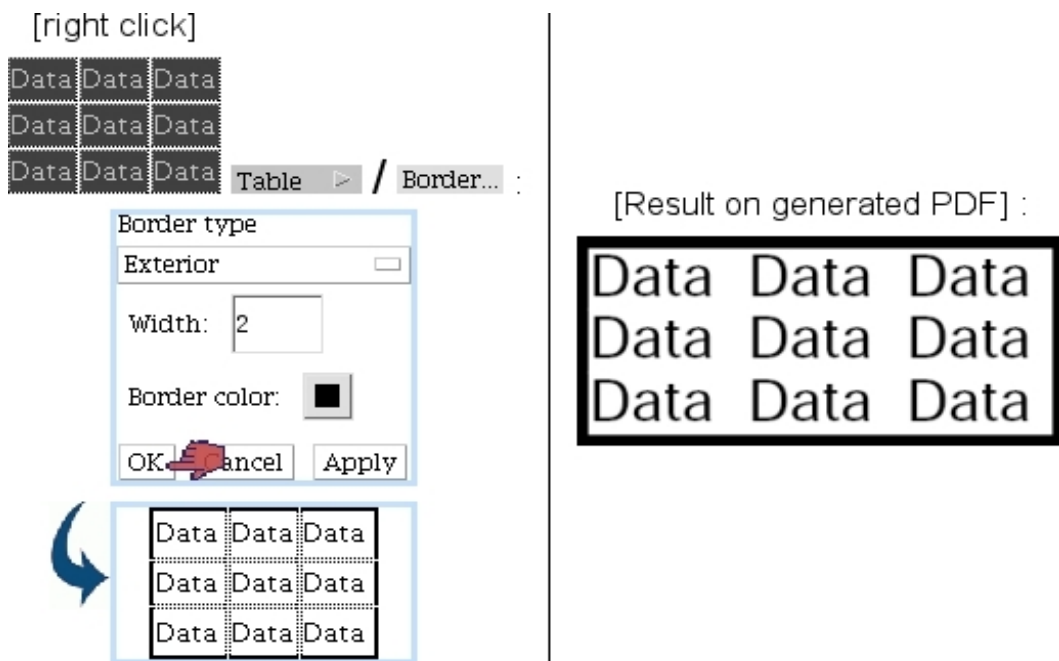


Figure D.18: Creating a table with outer borders only.

#### D.1.4.5 Adding columns and rows

Once created, a table can of course be expanded, column- and row- wise. For instance, Fig.D.20 features the adding of two rows : while cursor is in the table at the place where you wish to make the adding, do a right click and follow (in this case) **Table > / Add a row**.

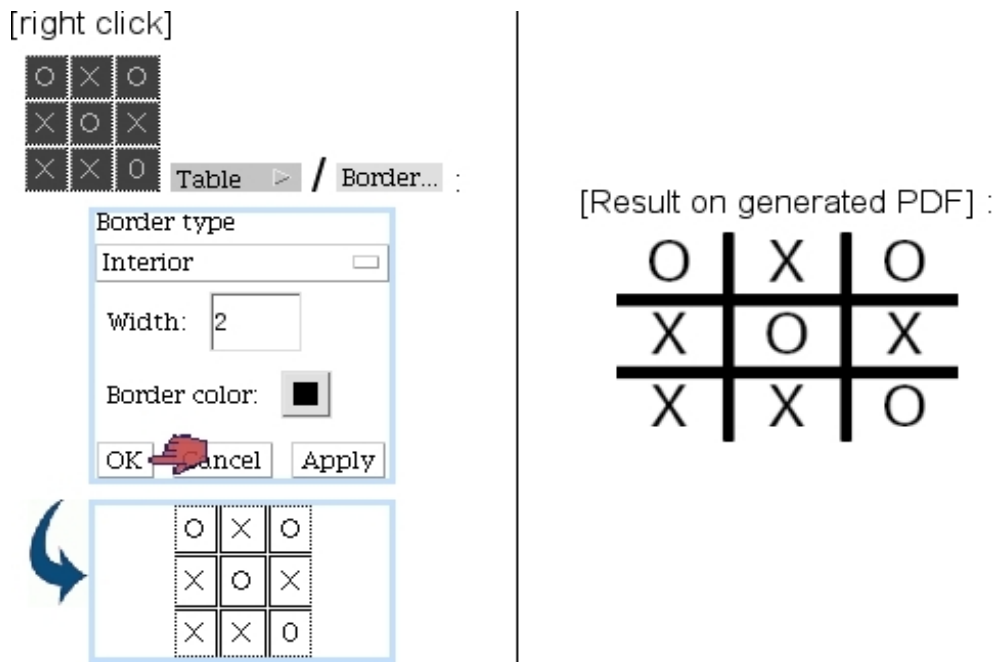


Figure D.19: Creating a table with inner borders only.

Subsequent pop-up then asks whether the news row(s) should be added before or after the row the cursor is at.

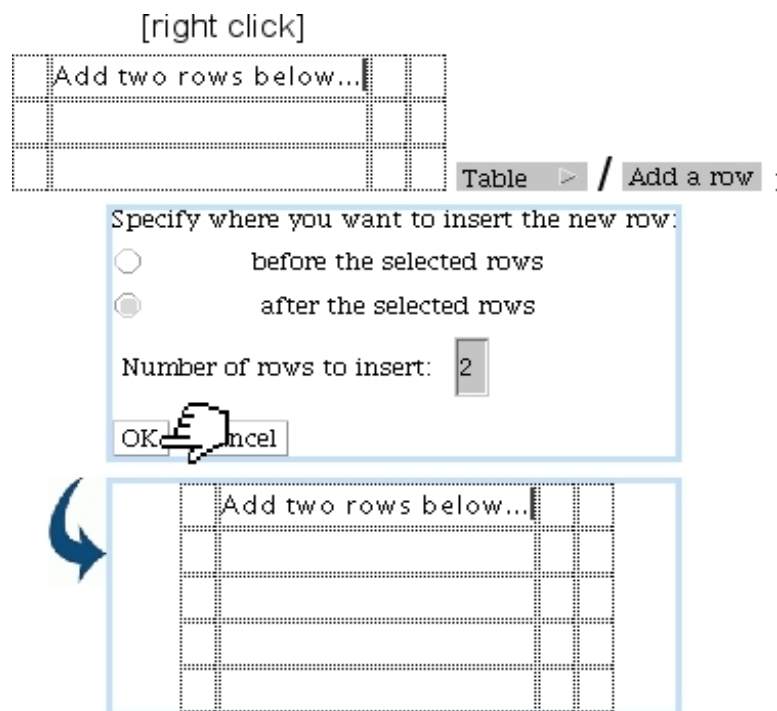


Figure D.20: Expanding a table by two rows.

Adding one or several columns works similarly, via **Add a column**.

#### D.1.4.6 Removing columns and rows

As illustrated as an example on Fig.D.21 deleting rows works by selecting (holding mouse left button) rows to delete, right-clicking, and following **Table** > / **Delete selected rows**.

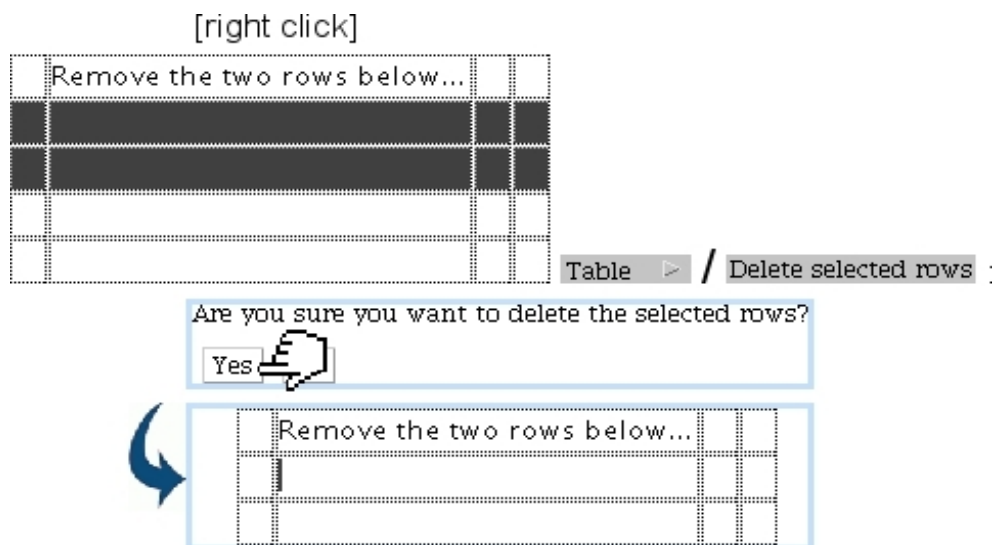


Figure D.21: Removing these two selected rows.



Deleting one or several columns works similarly, via **Delete selected columns**.

### D.1.5 Document images

#### D.1.5.1 Uploading images

In order to be inserted into a document, images must be first uploaded (7.4.1.1) via the File Manager in the predefined directory called 'OPSIImages' (which must never be deleted).

#### D.1.5.2 Inserting document images

As illustrated on Fig.D.22, images are inserted by placing cursor at wanted place and clicking on ; thus, on subsequent pop-up window, image is chosen amongst the ones that have been uploaded to the 'OPSIImages' folder. As a result, image appears in the Editor as a  icon: this means that image is protected (i.e. editing it in this context is disabled), and will only appear in the electronic or PDF generated document.

#### D.1.5.3 Document image properties

As featured in Fig.D.23, images as inserted in a document can be resized as needed (new dimensions given in pixels).

Also their alignment can be set and a border can be added.



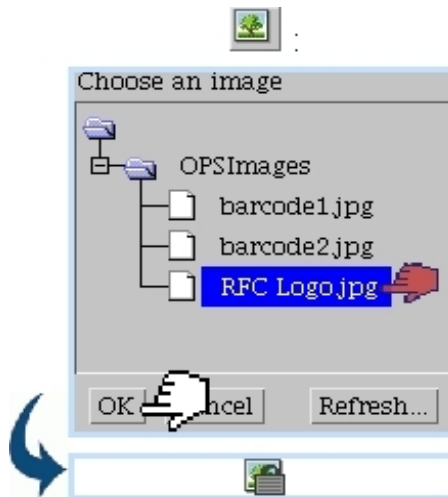


Figure D.22: Inserting an image into a document.

[right click]

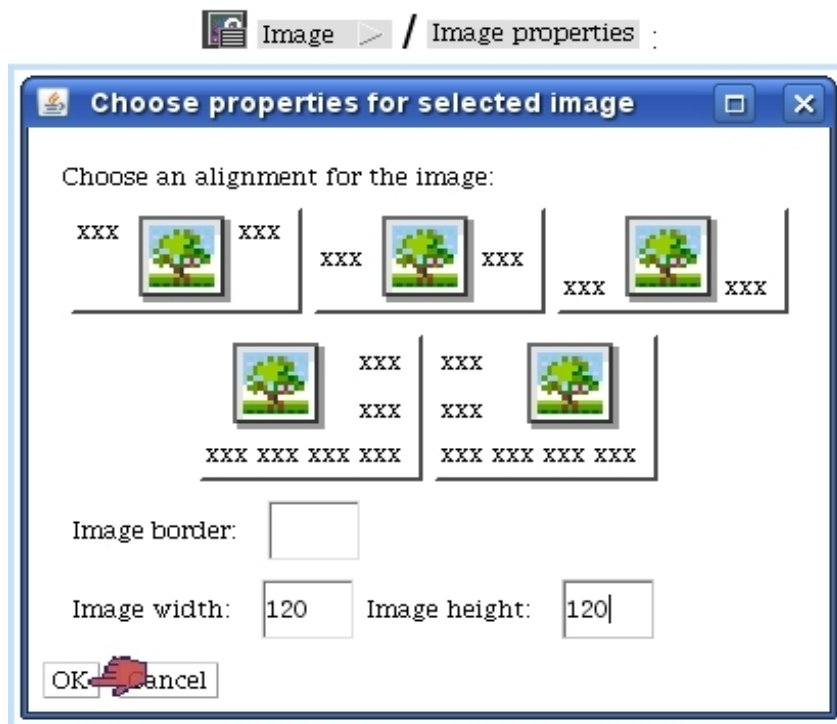


Figure D.23: Resizing a document image.

## D.1.6 Client-related information - and other information

The strong feature of the Document Editor is that it allows to create documents as generic as possible, client data-wise : the names, addresses,... of clients to whom the document will be sent are never typed explicitly, but instead will be integrated by Blue Chameleon during the generating phase (PDF or electronic mail) thanks to client variables accessed by `<var>`, as displayed on Fig.D.24.

For instance, putting the <FirstName> variable will make it appear as the real client's first name on the generated document.

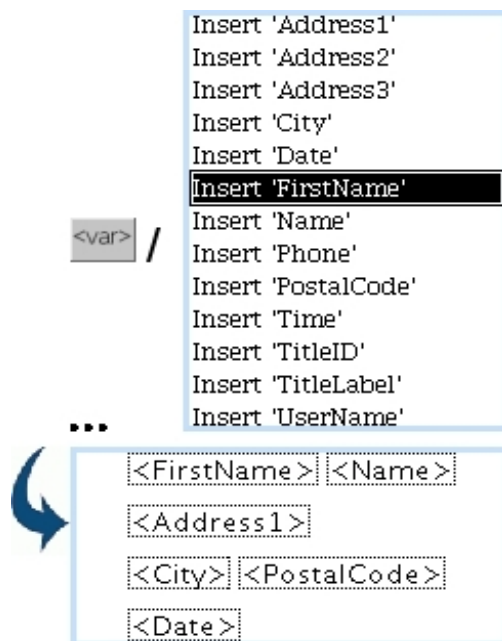


Figure D.24: Putting clients' variables, that will be afterwards translated as client data.

Other available information is for date and time - both corresponding to the moment when the PDF/email has been generated/sent.

Here is how the example on Fig.D.24 has been interpreted :

[Result on generated PDF] :

**John Smith**  
**12 Orange Road**  
**Los Angeles 90000**  
**2008/12/12**

These variables are particularly useful when generating Customer Relationship Manager forms from predefined models (7.9.10.2).

## D.2 Mailings and campaigns templates

Mailing and campaigns PDF documents are generated upon a print template that you can define through **General** / **Personalization** / **Print templates**. A print template

serves exactly as a prefilled "writing paper" in which you can put your company's general information (for instance its logo), etc. as well as disclaimers.

It is to note that, in the case of the 'Default' print template as used for invoice printouts (5.5.8), no header needs to be defined as it is already catered for by the invoice generating process.

### **D.2.1 Creating a template**

As displayed at Fig.D.25, a print template is created by giving the following :

- the paper size (A4 or Letter) ;
- the orientation (Portrait or Landscape) ;
- the intended use : tick the 'misc.mailing' box to make it available for Customer Relationship Manager and, if you wish to use it in the context of invoices, tick also 'invoices'
- the heights to give to the header and footer margins, defined for the first page and the following pages ;
- finally, through the four Editor panels, the contents that will be placed in the headers and footers of the first and following pages.

General / 
 Personalization / 
 Print templates / 
 Add new print template

### Add print template

Name:

Paper size:

Orientation:

Usage:  misc. mailing  
 invoices

---

All pages

Height: Header:  mm Footer:  mm

Header: **[Text Editor]**

Footer: **[Text Editor]**

---

First page

Height: Header:  mm Footer:  mm

Header: **[Text Editor]**

Footer: **[Text Editor]**

Figure D.25: The page which serves to create a 'All-Purpose Print Template' to be used in two contexts, CRM and invoices.

## D.2.2 Example

*(For the Editor general use, please see D.1).*

### D.2.2.1 Header

Fig.D.26 shows how, thanks to a 2-column, 1-row table, it is possible to put your company's logo and general information on the top right of the first page in a well-sorted way.

### D.2.2.2 Footer

Fig.D.27 illustrates how to create for instance a centered disclaimer (topped by a horizontal bar) to appear at the bottom center of the first page.

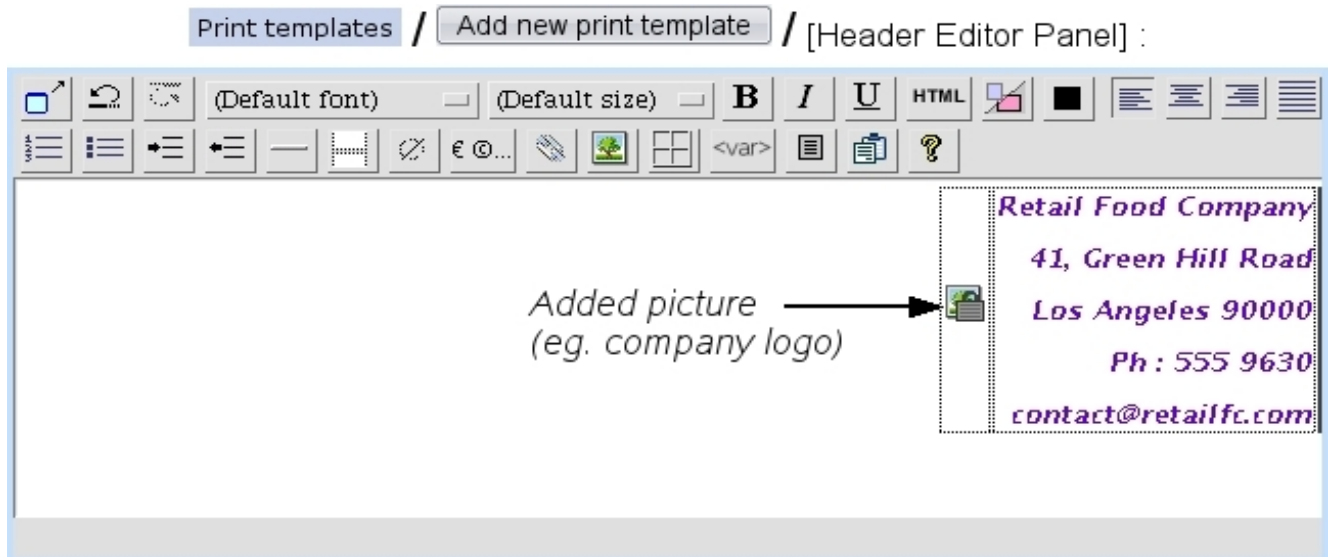


Figure D.26: The 'Header:' Editor Panel, enabling here to design a right-aligned company logo and general information.

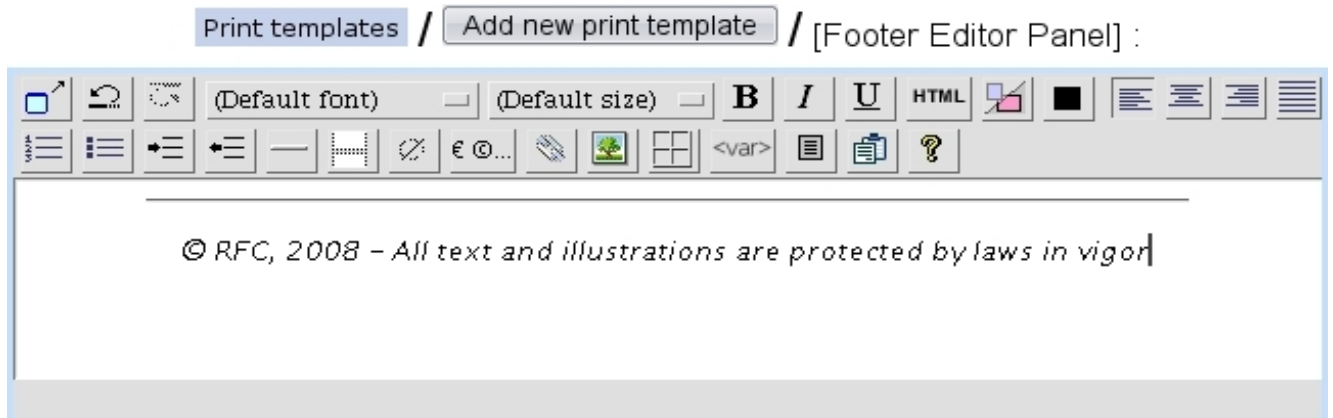


Figure D.27: The 'Footer:' Editor Panel.

### D.2.2.3 Result

Fig.D.28 finally shows the final writing paper obtained with the print template defined above.

## D.3 Model document management

Model documents are to be used in the context of the Customer Relationship Manager.

### D.3.1 Creating a model document

For a new campaign (whether electronic or postal) or letter, the first stage is to create the model document, through the **New model** button as available on the *Campaign Manage Page* (Fig.7.68) or on the *Letter Manage Page* (Fig.7.77).

[Result on generated PDF] :

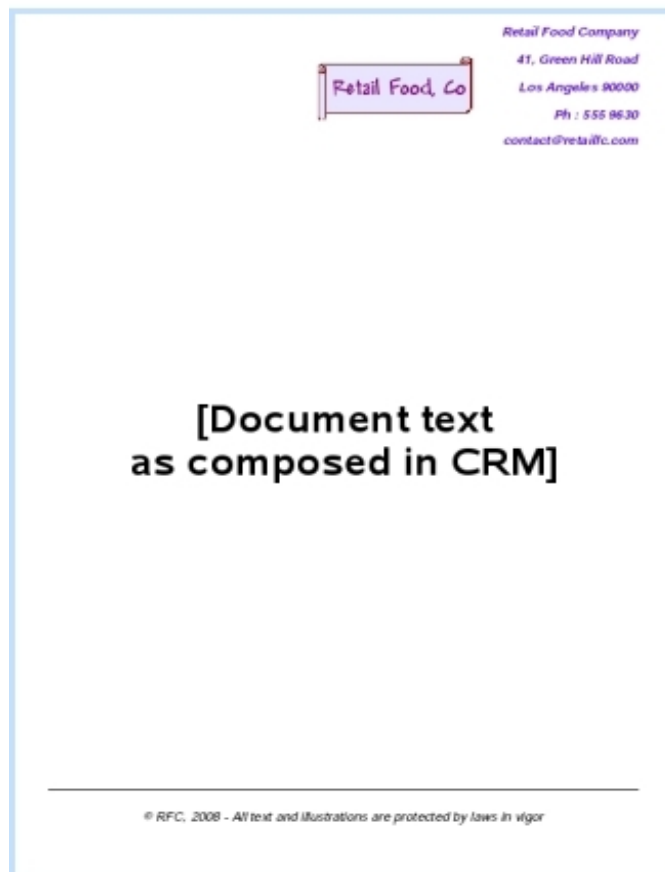


Figure D.28: The 'All-Purpose Print Template' as it will appear on PDF-generated documents.

An Editor window then displays, where, as featured on Fig.D.29, a name for this model document is entered (here, 'New Offer') and a writing paper (see D.2 above) is chosen. The **Create** button will then make appear a File Manager window (see 7.4) where, in this example, we save this new model document into a 'CRM' folder that has been created before (see 7.4.1.1 about folder creating).

Finally clicking **Save** on this window will create the model document in this folder, and it will now be accessed via **Select model**.

### D.3.2 Selecting a model document

Once created in the process as described above, a model document can be loaded via **Select model document...** as available at on the *Campaign Manage Page* (Fig.7.68) or on the *Mailing Manage Page* (Fig.7.77), as shown on Fig.D.30.

Once selected, this model document can be opened via the Editor by clicking on the

New model :

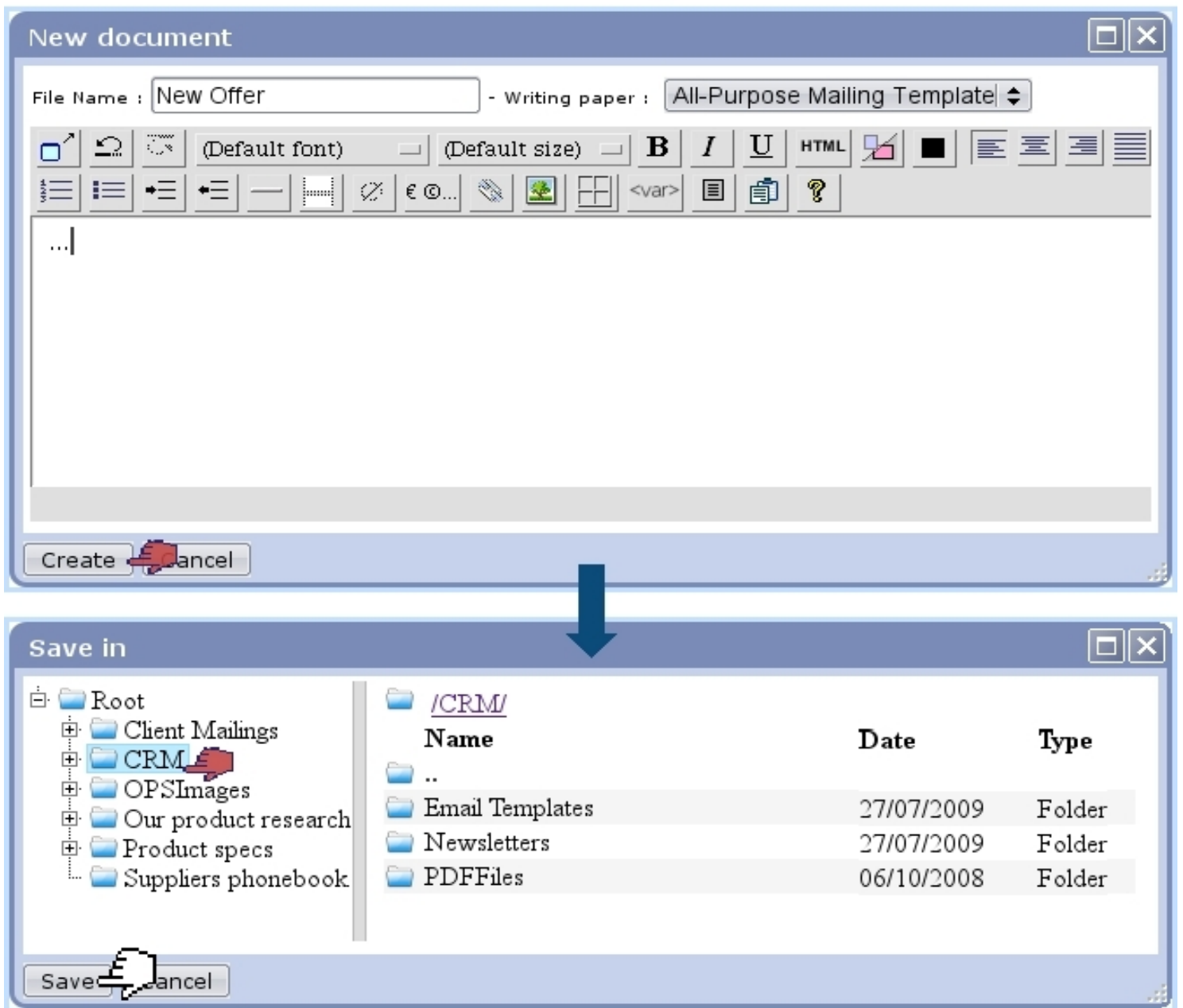


Figure D.29: Creating a new model document.

now appearing [file](#).

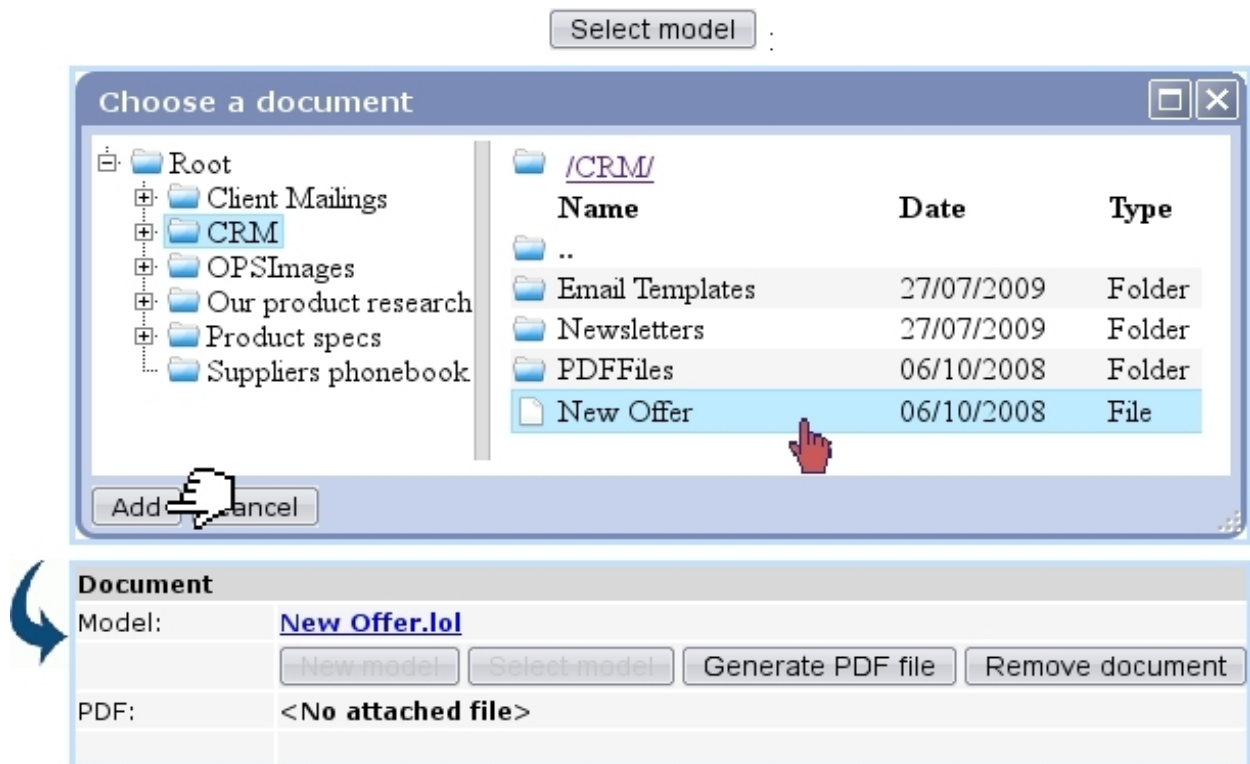


Figure D.30: Selecting a document.