



Docuassembly™ - A Quick Start Guide


Once XpressDox is installed as an add-in in MSWord, you can start marking up and running templates straight away – no pre-configuration is needed.

Many people are familiar with word processing software such as Microsoft® Office Word for example. While these applications help users produce professional documents they are not efficient tools for doing this repetitively, where only certain information changes each time a document is produced.

Document assembly software adds value to word processing through the concept of a template, which has the variable parts of a document identified (or marked up) differently from the static parts. In this way, when a template is subsequently used (or run), the user is asked only for the variable data, which is then inserted into the template at the correct places, producing a completed document.

This process works for both simple and complex documents, even to the point where document assembly is integrated with other of your applications and databases.

A sample template

Try your hand at constructing a standard letter or fax template, for example. If you are reading this document in Word, you can just copy-and-paste the following into a blank Word document, and then save it, say in the My Documents folder (or even just save this entire document without even bothering to copy-and-paste). Save it as an "XpressDox Template" using the "Save as XpressDox Template" button ( in the XpressDox ribbon/toolbar) to Save in the correct format.

<<Addressee>>
<<AddressLine1>>
<<AddressLine2>>
<<AddressLine3>>
<<PostalCode>>


Dear <<SirOrMadam>>

RE: <<re>>

Yours sincerely
<<FirmName>>


This is something like a letterhead layout.

Run a template

Once the template is saved (in XpressDox Template format), press the  "Run an XpressDox template" button in the XpressDox ribbon/toolbar. You will be prompted to choose the template, XpressDox will then read the text and analyse all the fields and present you with a form into which you can capture the data for those fields.

Once you press OK on the data capture form, XpressDox will ask for a location and name of the file to which it should save the result document. It will default the folder to the same folder in which it found the template, but you can navigate to another folder if you want to. Choose a folder and a name and save the result document there.

The Template Author's Toolkit

You can try adding more fields to the template or change some existing fields. The "XpressDox Template Author's Toolkit" button  will launch a form which contains samples of all the XpressDox commands and fields, grouped in a tree view. Open a group and double-click on one of the items that most fits your needs. For example, open the "Data Capture" group and double-click the "Choose field value from a list". Use this to define a list of acceptable values for <<SirOrMadam>> (N.B. – don't remove the <<SirOrMadam>> field when you include the <<ChooseFromList...>> command, otherwise you will capture the value but never fill it into the document!).

Re-using data

When running a template, and the data capture form is presented to you, there are two buttons on the lower left. Using these, you can choose to use the data from the previous template (the "Use Previous Data" button) or, you can use data saved on a previous occasion ("Use Other Data").

If you look in the folder where XpressDox has saved the result documents, you will notice files with names like SampleDocument.xddata.xml. A file named like this will contain the data which was captured for the template which was saved as SampleDocument.xml.

Samples

A set of sample templates and data sources will have been placed in the My Documents\XpressDox\Samples folder. See www.xpressdox.com for solutions to typical document assembly problems.