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Infiniti Design Best Practices

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Infiniti Design Best Practices

Version 8.2

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Table of Contents

1 Overview 5

2 Question Types 6

User Prompt 6

Variable 6

Data Source 7

Label 7

Group Logic 8

Auto Logic 8

3 Bookmarking Convention 10

Bookmark Name Layout 11

Bookmark Name Rules ..... **Error! Bookmark not defined.**

Bookmark Placeholder Text 12

Gap and Repeat Bookmarks 12

1 Overview

Intelledox encourages best practices during designing and maintaining projects. Many organisations already have some design standards that they enforce, through style guides or other material that dictate how logos, corporate styles, fonts and colours are to be used in material. It's also important to incorporate a set of standards when developing Infiniti documents and forms to ensure they are easy to maintain, comply with corporate requirements and provide a consistent experience for designers and end users of the product and its output.

This document has been created as a reference guide for building standards into your Infiniti implementation.

2 Question Types

This section describes standards to apply to individual question types in the design of your templates. Some of the standards suggested may depend on circumstances, and should be decided early when building a new template to avoid rework later.

Answer Names

You should always change the default answer name text to something meaningful. Do not leave the default. For example, 'Full Name' is more descriptive than 'New Answer 1'.

Although it's important to name answers, it's also important to note that answer names may be included in question references, and so you must be careful to avoid the following elements in your answer names:

- Special characters that may cause issues in question references. Avoid using any non-alpha-numeric characters except underscore (_), hyphen (-), space ( ) or colon (:). In particular never use vertical bar (|) or square brackets ([or]).
- Duplicate answer names should be avoided as they create ambiguity.

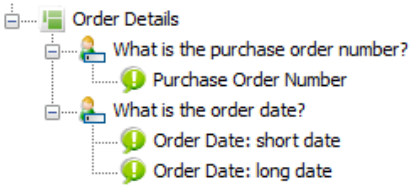
User Prompt

Question Text

This is the text visible in Produce (the wizard) and should be written consistently; if you phrase the text as a question with a question mark, you should do this consistently throughout. For example, 'Name' as the question text versus 'What is your name?' Note that which style is appropriate may differ based on the situation, and should be consistent and appropriate within each template.

Answer Name

Generally this should be the concise version of the question text, for example 'Name' could be the answer name for 'What is your name?' If you require multiple format strings, therefore require more than one answer, each answer name should include a brief description of the format string. For example, 'Order Date: short date'.



Variable

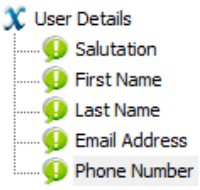
Question Text

This should be a label describing the purpose of the variable question, representing the answers it contains. This is not displayed to any users, so you can be descriptive to help 'document' the question's use for other designers. For example, 'User Details' is a good label to apply to a variable question that's primary purpose is to supply the template with information about the current user.

Avoid generic labels for variables, such as 'My Variables' as this does not indicate its purpose. If there is some mixed purpose of individual answers, consider separating into different variable questions.

Answer Name

This is a representation of the Variable field, and should indicate its data purpose or formula. For example, 'First Name' or 'Employee Age'.



Data Source

Question Text

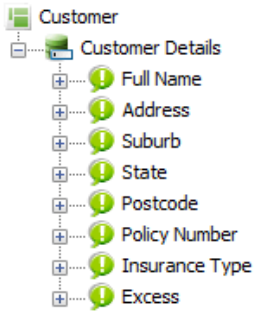
If the data source question is visible to the user for data selection, ensure the question text is consistent with other question styles in your template, and provide as much information as needed for the user to make an appropriate selection. For example, 'Please select a customer below'.

If the data source is invisible to the user the question text should be a concise summary of the table/view your data source is connecting to. If the actual table/view name is obscure ensure you include a more descriptive label in the question text. For example, 'Customer Details' rather than 'TBL0113'.

Answer Name

This should be the full name of the corresponding data field itself. If you are doing any data conversion or formatting, you should always include an indication of this in the answer name. This is especially important to avoid problems with question references to these answers, as the name should be unique from the data field name.

For example, a unformatted field named 'FullName' may be given the answer name 'Full Name', however a converted/formatted field 'DateOfBirth' should be given an answer name such as 'Date of Birth: date' to indicate it is converted to an actual date format.



Label

Label Name

This is the label's title, and by default is not displayed. If you choose to display to the user, treat this as the heading for the label and make it consistent with other question text or label titles.

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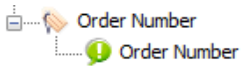
If it's to remain invisible, the title should be descriptive of the purpose of the label, e.g. 'Page Instructions'.

Label Text

The actual label value that is displayed in Produce.

Answer Name

This should be identical to the Label Name.



Group Logic

Question Text

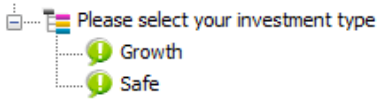
This is the text visible in Produce and should be consistent with the question style used throughout the template.

Answer Name

This should be identical, or very similar to the Display Text. Remember to drop any special characters that might be in the display text, such as square brackets.

Display Text

This is the text visible in Producer for each specific answer.



Auto Logic

Question Name

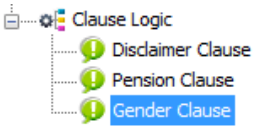
This should be a label describing the purpose of the auto logic question, representing the answers it contains. This is not displayed to any users, so you can be descriptive to help 'document' the question's use for other designers. For example, 'Clause Logic' is a good label to apply to an auto logic question that's primary purpose is to define rules on whether some clauses are included or excluded from the document.

Avoid generic labels for auto logic, such as 'My Auto Logic' as this does not indicate its purpose. If there is some mixed purpose of individual answers, consider separating into different auto logic questions.

Answer Name

The answer name should be descriptive of the rules defined in the answer. This should be as concise as possible. For example, 'Disclaimer Clause' is a good name for an answer that defines rules on whether to include the disclaimer clause.

Rather than have an additional Auto Logic question for each rule, add additional Auto Logic Answers to the Auto Logic question as shown below. Only related Auto Logic Answers should be grouped together.



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3 Placeholders

Placeholders are used extensively by Infiniti, and any document being automated by Infiniti will usually have at least one. In some cases there may be thousands of placeholders. As the number of placeholders in your document increases, it becomes more critical to follow a naming convention to make it easier to:

- find placeholders in Design, and
- work out the purpose of the placeholders without needing to jump back to the document.

If you plan and follow a convention right from the beginning, it becomes easier to manage your documents even if they grow larger than they start out.

Infiniti supports two types of placeholders, Tag placeholders (e.g. {{field}}) and Microsoft Word bookmark placeholder.

Infiniti Version 8 saw the introduction of Tag placeholders for all document types. This international standard was adopted to overcome some subtle yet challenging shortcomings of Microsoft Word bookmarks. Please refer to *Infiniti Knowledge Base* for more information about using Tag placeholders.

After their release, Tag placeholders are regarded as the best practise technique within the Intelledox Infiniti tool. This is so for reasons such as

- Tag placeholders can be used across all document formats such as Word, PowerPoint and XML.
- A single Tag name can be used multiple times throughout a document whereas bookmarks can be used once. (E.G. FirstName_01, FirstName_02, etc.)
- Tag placeholders have clear start and end points whereas multiple bookmarks can appear stacked upon one another or in rare circumstances not viewable at all.
- Tag names are always visible in a document, no need to open a separate dialog.
- It is possible to distinguish between Tag section and insertion placeholders over the bookmark equivalent, making selections easier in Design.
- Tag placeholders preserve the look of a document whereas bookmarks can appear bare, for example an empty address block.
- Tag names are more flexible than bookmarks (the Microsoft Word bookmarking tool does not allow the use of spaces or any special characters besides the '_' character. Also, bookmarks in Word allow a maximum of 40 characters).
- Bookmarks in Microsoft Word are not turned on by default and need to be manually enabled by the user.

The remainder of this document will focus solely on the tag placeholders design techniques and best practices. Bookmarks are still supported but not considered a best practice design technique.

Tag Placeholder Name Layout

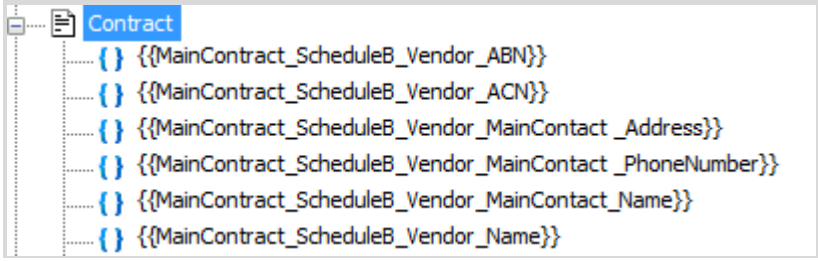
While tags are not grouped into categories, you can apply a meaningful name layout that helps group related tags together. Look at the complexity of the document and determine whether you need to group by one, two or more 'levels'.

For example, for a simple letter style document you may wish to use a single 'level' of grouping based on the position of the tag placeholder in the document. This would look like this:

```
{{AddressBlock_AddressLine1}}
```

In a more complex document, such as a contract, you may wish to add additional levels of grouping, for example:

```
{{MainContract ScheduleB Vendor Name}}
```



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Tag Placeholder Text

Insertion placeholders are used to mark where data or content is to be inserted in the generated document, while selection placeholders span an area of the document. For examples of these placeholders types, refer to the *Infiniti Knowledge Base*.

While selection placeholders span actual document content, insertion placeholders have their 'default' content replaced when Infiniti generates a document, unless the target data is null, and in that case the tag placeholder is removed from the document and replaced by empty text. So, basically, the technique is to put the tag name in the document where it should be replaced with content provided by the form, for example:

{{Header_FirstName}} {{Header_LastName}}

{{Header_AddressLine1}}

{{Header_AddressLine2}}

Gap and Repeat Placeholders

All placeholders that are to be used only as 'gap placeholders should end with the word '_GAP'. Similarly, all placeholders used to control repeating document areas should end with the word '_RPT'.

For example:

{{Header_FirstName}} {{Header_LastName}}

{{Header_AddressLine1}}{{#Header_AddressLine2_GAP}}

{{Header_AddressLine2}}{{/Header_AddressLine2_GAP}}