EZ Tag

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Changes are periodically made to this document. Changes, technical inaccuracies, and typographical errors will be corrected in subsequent editions.

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Introduction

EZ Tag allows creation of PDF variable data tags (FDF) from Elixir form files. EZ Tag is a purchasable option from Elixir Technlogies that allows conversion of any Elixir form file to Adobe PDF with fillable FDF fields and is available with Elixir Applications Suite 4.10q+.

These PDF files could be presented on a website using an Internet Browser, combined with a system for extracting the filled data, or for online data entry using the free Acrobat Reader (Version 5+) for local printing (www.adobe.com/products/acrobat).

Using the DataTag function within any ElixiForm product or the ElixiTag utility for Windows applications, you can convert the existing Elixir Form files with tags or create new tags in forms ready to be converted to Adobe PDF.

This document describes adding tags using Elixir form products (DataTags) or adding tags to Windows applications (ElixiTag) and converting these tags to PDF format using the Elixir Desktop products.

Note: DataTags for use with Elixir DocuTag and DataMerge are fully described in their respective User Guides, although the tags prepared for these products can be used with EZ Tag.

Adding tags

When creating new documents, you can add and/or modify data tags within your Windows application using ElixiTag and convert these Windows applications to Elixir form format using any of the Elixir PrintDriver products, or use any ElixirForm product to add DataTags.

The options for ElixiTag (Windows applications converted to Elixir forms) or for creating DataTags (Elixir form function) are the same and only those options required by EZ Tag are described in this document.
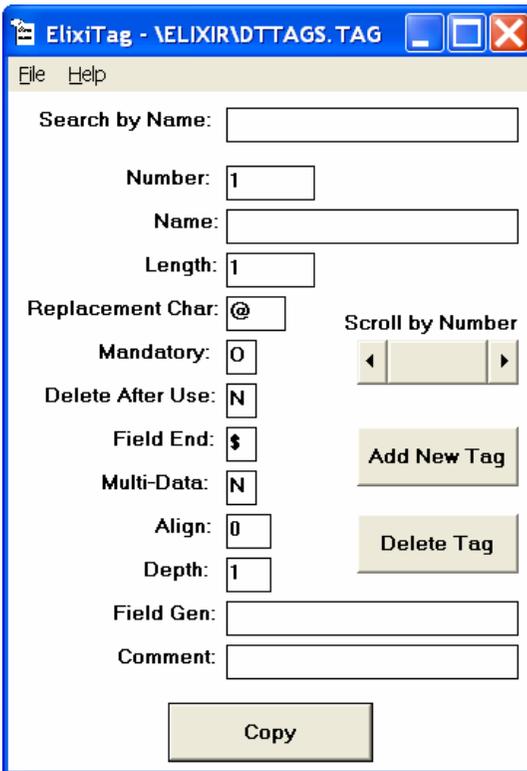
Using ElixiTag

ElixiTag is provided with Elixir DataMerge or Elixir DocuTag products and EZ Tag when the option is purchased.

To use ElixiTag to create data tags:

1. Start Programs>Elixir>ElxTag.

   The ElixiTag dialog box displays.

Figure 1 - ElixiTag dialog

2. Select the options for each tag and convert the document to Elixir format using any of the Elixir PrintDriver products.

    Note: Refer to your Elixir PrintDriver User Guide for instructions on how to convert a Windows application document to Elixir form files.

3. Convert the Elixir form files to PDF format using the Elixir Desktop product by checking [Include EZ Tag] from the PDF settings dialog.

Using DataTag

1. Open your Elixir Form product and select the Text Tool.

2. Select the DataTagging option from the Text Tool options, as shown below.

Figure 2 - Text Tool

3. Click the cursor in the work area where the DataTag should be positioned.

The Data Tagging dialog displays.

Figure 3 - Data Tagging Dialog

4. Select the options for each DataTag:

5. Select the text attributes for the field, such as font, point size etc., before adding the data tag to the form or right-click on the data tag after it has been created to access the [Modify Text Properties] option.

6. Save the form.

Options for ElixiTag and DataTag

ElixiTag and DataTag were created for use with Elixir DocuTag or Elixir DataMerge and can be also be used to define tags for EZ Tag. Only those options required for EZ Tag are described in this section.

File (ElixiTag only)

The File menu options include:

- [Open] - open a tag list file

- [Save] and [Save As] - save the file

- [Exit] - exit ElixiTag.

Help (ElixiTag only)

The Help menu options include:

- [Help on Current Field] - field where the cursor displays

- [Help on ElixiTag] - within the displayed dialog box, click on any option that changes the cursor to a hand for a description of that option

- [Customer Support] - provides phone numbers for problem resolution and training information

- [About] - how ElixiTag works with DocuTag.

Search by Name (ElixiTag only)

This field allows you to search by field name in your tag list file to display the associated tag attributes.

Number (ElixiTag (editable) and DataTag (generated))

Select or enter the number of the field. As you add tags, ElixiTag automatically increments default field numbers unless you enter a field number. The default numbers are sequential and start at 01. The largest field number allowed is 700.

Name (ElixiTag and DataTag)

Enter the name of the variable data field. The maximum allowable field name length is 30 characters.

Naming Convention to be used with EZTag

It is recommended that you use fixed pitch fonts for FDF fields so that the borders and field contents match. Tagnames are restricted to 32 characters in length.

If the tag name is prefixed with:

- **$_**
  The FDF field will display data entered as right justified (default) punctuated at thousands, with two decimal places.For example 2004.28 will be displayed in the field as $2,004.28. To change the default jusfication see the section, **Changing the Default Justification**

- *#_*
  The FDF field will display data entered as left justfiied (default) punctuated at thousands, with two decimal places. For example 2004.28 will be displayed in the field as 2,004.28. To change the default jusfication see the section, **Changing the Default Justification.**

- **BORDER_**
  The FDF field in the PDF file will be surrounded by a border . The border color is controlled by the setting in the PDF.txt definition file. Valid colors for borders are black (default), red, green or blue.

- **CHECK_**
  The FDF field in the PDF file will display an empty box . When the user

selects the checkbox the ✓ character will display. It is recommended that the [Field Length] is seet to at least two characters.

- **CHECKB_**
  The FDF field in the PDF file will display an empty box surrounded by a border. It is recommended that the [Field Length] is set to at least two characters. The border color is controlled by the setting in the PDF.txt definition file. Valid colors for borders are black (default), red, green or blue.

- **COMPLETE**
  Reserved keyword.

- **DEFAULT_tagname**
  Will display the string added to the comment field as the default text in the FDF field. The FDF field can be edited to replace the default text when viewing the PDF document.

- **DIFF_tagname**
  Will display the sum of subtracting the fields listed in the Comment field, the FDF field will be right justified and punctuated at thousands with two decimal places.

- **DIFF$_ tagname**
  Will display the sum of subtracting the fields listed in the Comment field, the FDF field will be formatted as US dollar currency, right justified and punctuated at thousands with two decimal places.

- **DROP_ tagname**
  The FDF field in the PDF file will display the list of entries entered in the comment field as a dropdown selectable list.

  See the Comment field for adding entries to be used by a dropdown selection.

- **DROPEDIT_ tagname**
  The FDF field in the PDF file will display the list of entries entered in the comment field as a dropdown selectable list and also allow additional text entry in the FDF field.

See the Comment field for adding entries to be used by a dropdown selection.

- **GRAY_ tagname**
  The FDF field will be filled with a shade pattern.

- **MULT$_ tagname**
  Will multiply the data entered in those fields listed in the Comment field and display the result as right justified with a $ mask.

- **MULT_ tagname**
  Will multiply the data entereed in those fields listed in the Comment field and display the result as right justified amount.

- **RADIO_ tagname**
  Will display as a check box with the text associated entered in the comment field. A radio button represents a fixed set of choices each with text next to it, one of which must be selected. The text entered into the comment field is the string that would be returned to the URL in the PDF.txt definition file.

- **RADIOB_ tagname**
  Will display a radio check box with a border. The text associated with the radio button should be entered into the Comment field.

  This prefix should be used when borders are set to [No] in the PDF.txt definition file.

- **SUBMIT**
  Reserved keyword.

- **SIGNATURE**
  Reserved keyword.

- **TAGNAME.REQ**
  This type of tag is defined as a required fillable field in the PDF file.

- **TOTAL$_ tagname**
  Will total the data entered in the fields listed in the Comment field and display the result with the $ mask, right justified (the default) and punctuated at thousands with two decimal places. To change the default jusfication see the section, **Changing the Default Justification.**

- **TOTAL_ tagname**
  Will total the data entered in those fields listed in the Comment field and display the result as left justified (the default), using the comma separator and two decimal places. To change the default jusfication see the section, **Changing the Default Justification.**

Changing the Default Justification

You can override the default justification for a field by add the following extensions to the tag name:

- **Prefix_tagname.L**
  Left justified field.

- **Prefix_tagname.C**
  Centre justified field.

- **Prefix_tagname.R**
  Right justified field.

Length (ElixiTag and DataTag)

Enter the maximum number of characters allowable in the specified field.

Replacement Char(acter) (ElixiTag and DataTag)

Variable data fields display in the windows application document or the Elixir form as a string of replacement characters. The replacement character is usually a @, !, #, or " character. When you click on [Add New Tag], ElixiTag automatically rotates the replacement character. Enter the character, if different from that displayed, to be used for the new tag.

Note: Replacement characters should not be characters used in the text data.

Mandatory (ElixiTag and DataTag)

Reserved for DocuTag. See your DocuTag User Guide for a detailed description.

Delete After Use (ElixiTag and DataTag)

Reserved for DocuTag. See your DocuTag User Guide for a detailed description.

Field End (ElixiTag and DataTag)

Reserved for DocuTag. See your DocuTag User Guide for a detailed description.

Multi-Data (ElixiTag and DataTag)

Reserved for DocuTag. See your DocuTag User Guide for a detailed description.

Align (ElixiTag and DataTag)

Reserved for DocuTag. See your DocuTag User Guide for a detailed description.

Depth (ElixiTag and DataTag)

Enter the number of lines in the specified variable data field. The default is 01.

Field Gen (ElixiTag and DataTag)

This option allows you to include non-replacement characters in the middle of a string of replacement characters. This is useful when formatting date fields or telephone numbers. For example, to separate the month, day, and year in the date field with slashes, type **/**/** (where * is the replacement character you specified).

To print the telephone number, you can type (***)***-**** (where * is the replacement character you specified).

Enter the non-replacement characters as you want them to display in relation to the replacement characters. Maximum field length is 30 characters.

Comment (EZTag, ElixiTag and DataTag)

For EZTag the comment field is used when the field prefix for DROP_, DROPEDIT, TOTAL$, MULT, or MULT$ is used or as help text that will display when the cursor is passed over FDF fields in the PDF document. You must separate values or field names in the comment field by a space character, e.g. Texas California New Mexico etc.

Scroll by Number (ElixiTag only)

You can scroll through the pre-defined tag list one tag at a time or press and drag the scroll box to move forward or backward in the tag list.

Add New Tag (ElixiTag only)

Once you define a tag other than one that is in the list, use this option to add it to the list for re-use. This saves the tag to your drive:\ELIXIR\DTTAGS.TAG file.

Delete Tag (ElixiTag only)

This option deletes the selected tag from your drive:\ELIXIR\DTTAGS.TAG file.

Copy (ElixiTag only)

This option copies the tag information to your Clipboard. Once you return to your Windows application, you can paste the tag from the Clipboard into your document.

Click on [Copy] to copy the data tag information to the Clipboard.

Open your Windows application and place the cursor on the form where you want the data tag to print.

From the Edit menu, select [Paste]. The tag with replacement characters displays in the document.

Note: Once you have pasted a data tag into your document, you cannot edit it. You must delete the tag and create a new tag.

Existing Elixir Forms

Using the utility MAKECHKB.exe provided with EZTag existing Elixir form files (*.elx) that contain checkboxes defined using special font characters can be converted to CHECKB_ without having to add new datatags.

Usage:

MAKECHKB FILENAME SEARCHCHAR [WIDTH]

Where:
MAKECHKB
Is the utility stored in your drive:\ELIXIR folder.

FILENAME
Is the name of the Elixir form file(s) to be converted. The path should be included in the filename and wildcards can be used.

SEARCHCHAR
Is the character in the existing Elixir form that will be converted into an FDF field. As an example the character 'b' will be converted

[WIDTH]
Is the optional width of the FDF CHECKB_ field. It is recommended that checkboxes have a length of at least two characters.

Creating the definition file for EZTag

The default presentation of the FDF fields for position, font and field length are controlled by the field defined in the Elixir form. A definition file can be created to define the following:

- Position on the PDF file and the URL where the file will be sent when the [SUBMIT] button has been activated.

- Border, Border color and border fill for the FDF field

To create a definition file:

Create an ASCII text file in DRIVE:\ELIXIR\PDF.txt with those entries required for PDF conversion. A sample PDF.txt file is displayed below for your reference.

SUBMITURL=http://XXX.XXX.X.XXX/name.asp
SUBMITPOS=1,1,300,75
COMPLETEPOS=300,1,600,75
BORDERS=YES
BORDERCOLOR=RED
DODEFAULTS=NO
TEXTCOLOR=GREEN
SORTBYTAGNUMBER=YES
SUBMITTYPE=HTML
SCROLLING=NO

where:

Submiturl
Has the ip address and active server page where the PDF file with the FDF fields will be submitted when the [Submit] button is activated on the PDF file.

Submitpos
The [Submit] box position on the output PDF file. The co-ordinates are top left x, top right x, bottom left x, and bottom x right in dots per inch. All forms will have this field added.

Completepos
This is reserved for workflow systems and indicates if the form is complete.

Bordercolor
Definition of the color of the FDF field border. [Black] (default), [Red], [Green], or [Blue].

Borders
Definition for displaying field borders or field fill. [No] (default). Selecting [Yes] will display a border around each field. Selecting [Gray] will display the borders with a shade pattern.

Dodefaults
Definition for default entries in each FDF field. Selecting [Yes] will use the entry in the Comment field as the default filled string for the FDF field.

Textcolor
The color that text will be displayed when entered into FDF fields. [Black] (default), [Red], [Green], or [Blue].

Scrolling
Definition for fillable fields to allow scrolling of text entered. Fillable FDF fields that are destined for printing should have this option set to [No]. The default, [YES] will allow scrolling of the field entry and when printed will only print the text that is displayed and not the full entry.

Sortbytagnumber
Sorts the FDF fields in the PDF file when the TAB key is used. [YES], will set the order of the fillable FDF fields in the PDF file using the [Field Number] in the Data Tagging options dialog box for the Elixir form.

[NO], the default. The tab order will be sequenced from the top of the PDF file to the bottom of the PDF file.

Submittype
[HTML] the default, only the data entered in the presented PDF file. [COMPLETE], saves the data and the complete PDF file.

Generating Adobe PDF files with FDF fields

Converting the Elixir Form files (.ELX) to PDF format with FDF tag files is achieved using any of the Elixir Desktop products base release 4.10q+ when an EZ Tag Option is purchased.

To convert to PDF:

1. Launch your Elixir Desktop product.

2. Select the forms for conversion to PDF and drag and drop into the Converter icon, or <Ctrl> +<V>.
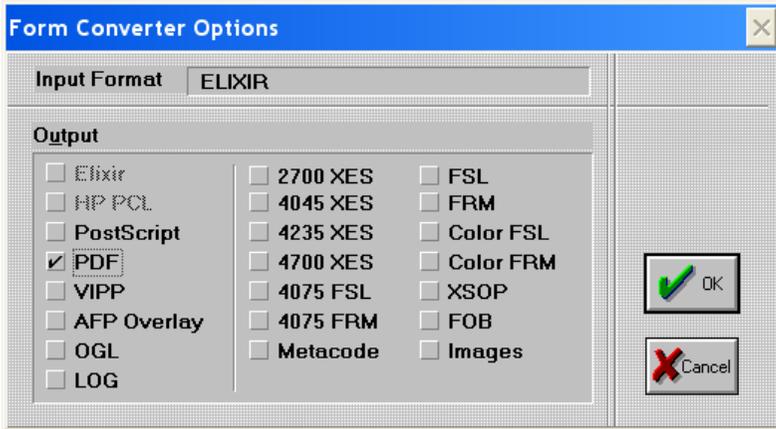
   The Form Converter Options displays.

Figure 4 - Form Converter Options Dialog

3. Select [PDF] and then [OK].
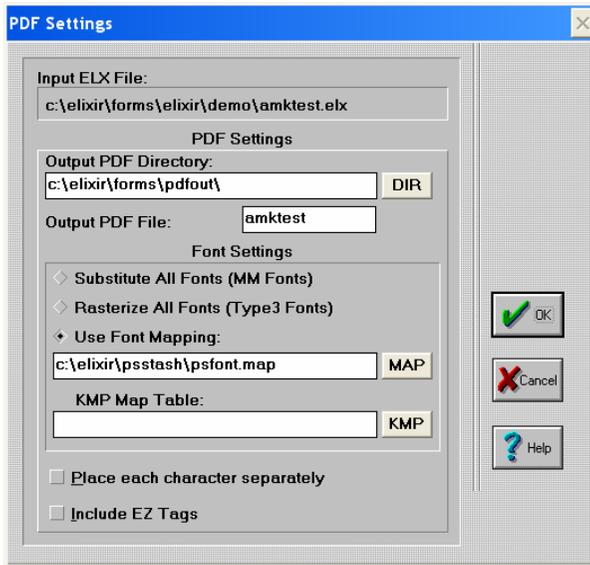
   The PDF Settings dialog displays.

Figure 5 - PDF Settings Dialog

4. Select the [Output PDF Directory] where the PDF files will be stored and the Output PDF file name if different from the Elixir file name.

5. Select the [Font Settings] option to be used for the output PDF file:

[Substitute All Fonts (MM Fonts)]
Substitutes the original fonts in the Elixir form file to Adobe Multiple Master versions of all fonts in job. This option will significantly reduce the size of the output PDF file if Elixir Raster fonts were used. The font representation in the output PDF file will be simulate the typeface used, preserving the line endings of the original file.

[Rasterize All Fonts (type3 Fonts)]
All fonts used in the Elixir file will be embedded as Type3 raster fonts in the output PDF file. This will preserve the fidelity of the original file and fonts used. This will increase the size of the PDF file significantly.

[Use Font Mapping]:
Select to use a mapping table to control, on a font-by-font basis, the font

format used in the PDF file. When you use this method, you can use a combination of Multiple Master, Adobe Type 3 raster fonts and Adobe Type 1 (PostScript) name mappings for the fonts in your document. The mapping table will also allow you to rasterize images used in the Elixir form file.

Enter the mapping file to use in the text box adjacent to this option.
Default is drive:\ELIXIR\PSSTASH\PSFONTS.MAP.

When you select this option, the Elixir Desktop Application scans the specified file and compares Elixir font names in the document with the names found in the mapping file (see example below). If a match is found, the Elixir Desktop looks at the right half of the entry to determine whether to rasterize as a Type 3 font or call the font out by a Type 1 name. If a match for a particular font is not found, a Multiple Master instance is generated.

The mapping file is a text file with a simple equivalence table, which you can edit. The syntax for the entries is:

font name= [RASTERIZE] [TYPE1fontname-weight point-size]

For example:

TR11NP=Times-Roman 11
TR12NP=Times-Roman 12
HE07BP=Helvetica-Bold 7
CH14SP=ZapfChancery-MediumItalic 14
SIGFNT=RASTERIZE

If you specify a Type 1 font name, you must enter it exactly as it appears in the Installed ATM Fonts dialog box in the Adobe Type Manager. If you want to view the resulting PDF file on another workstation, the font must be available through ATM on that target machine.

6. Select the [KMP Map Table] to be used for the conversion. The default is drive:\ELIXIR\FONTS\MAPS\X100ANSI.KMP.

Select the KMP table from the drop-down list to be used for mapping characters into the correct positions for the Windows character set. You can

either select from the supplied list of KMP files, please refer to your Desktop or Form Editor User Guide for the list of supplied Keyboard Mapping files, or you can create your own keyboard mapping table.

The KMP file is an ASCII file that consists of two columns:

PostscriptCharacterName   = Hexidecimalvalue

where:

Postscriptcharactername
Is the name of each character in a font set.

Hexidecimalvalue
Is where the Postscript character will be mapped to in the output PDF.

The most common edits to a KMP file are mapping the Left Double Quotation Mark or Right Double Quotation Mark for the Quotation Mark.

7. Check [Include EZ Tags], then [OK].

8. The Form Conversion Status dialog will display showing the status of the conversion.
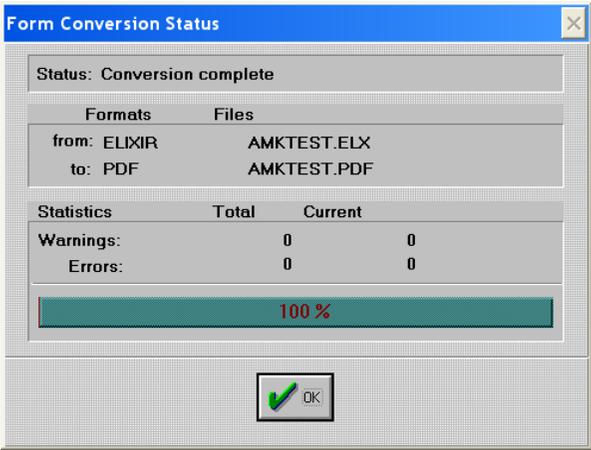
Figure 6 - Form Conversion Status

The PDF files will be converted and stored in the output forms directory for PDF files. These files can be viewed by Acrobat Reader (Version 5+).