

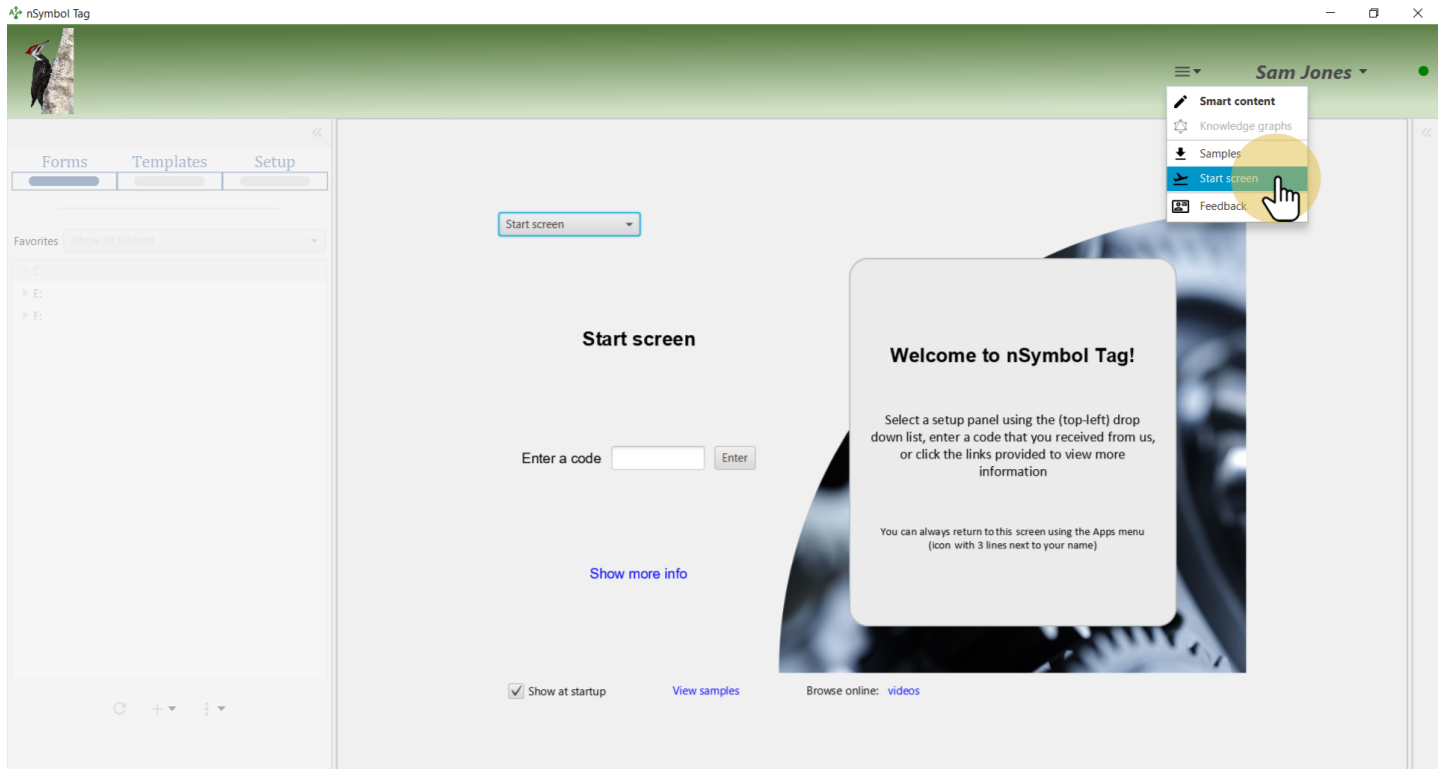
DOCX Import

This guide shows how to import static content from *.docx files.



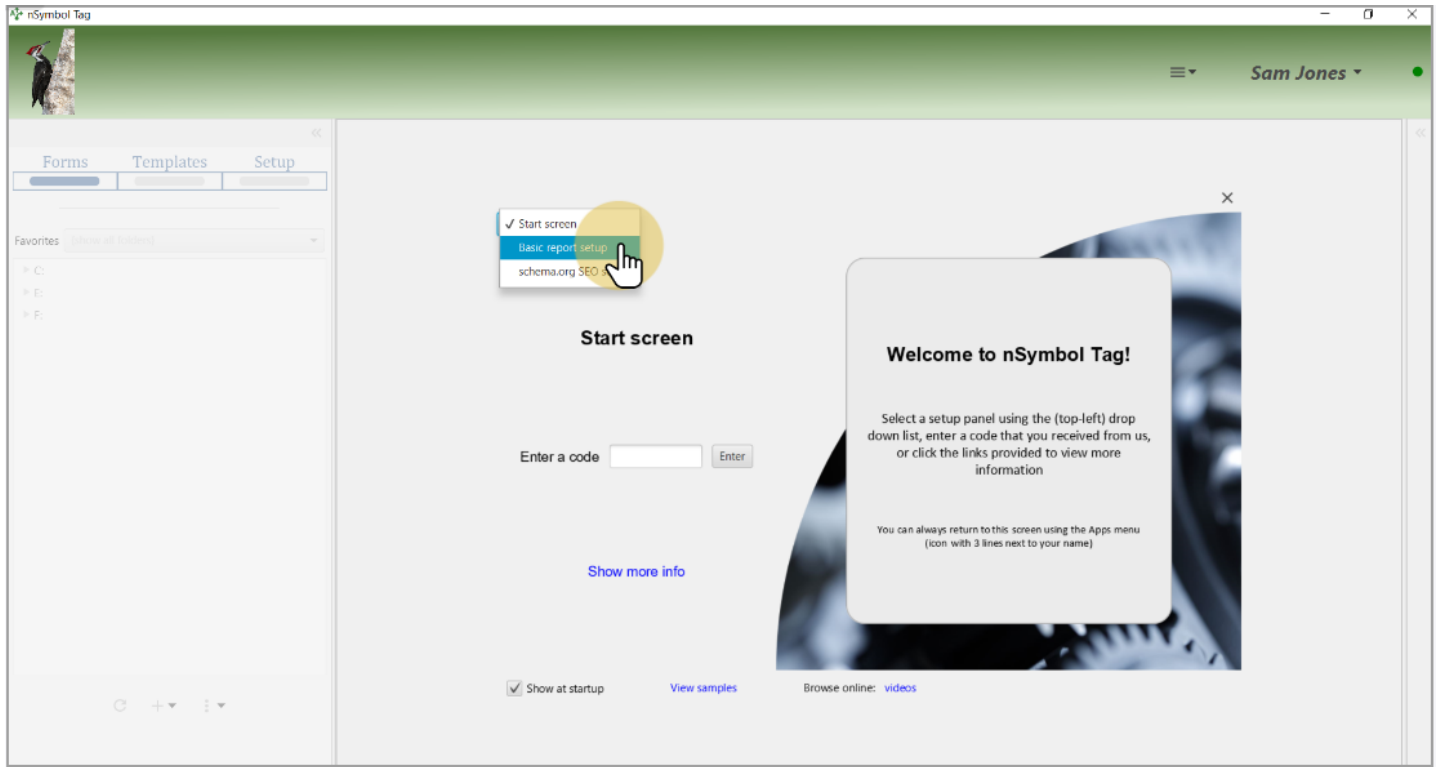
1 Show Start screen

After installation the *Start screen* will automatically display. If it gets closed, you can always open it again using the *Apps menu*.



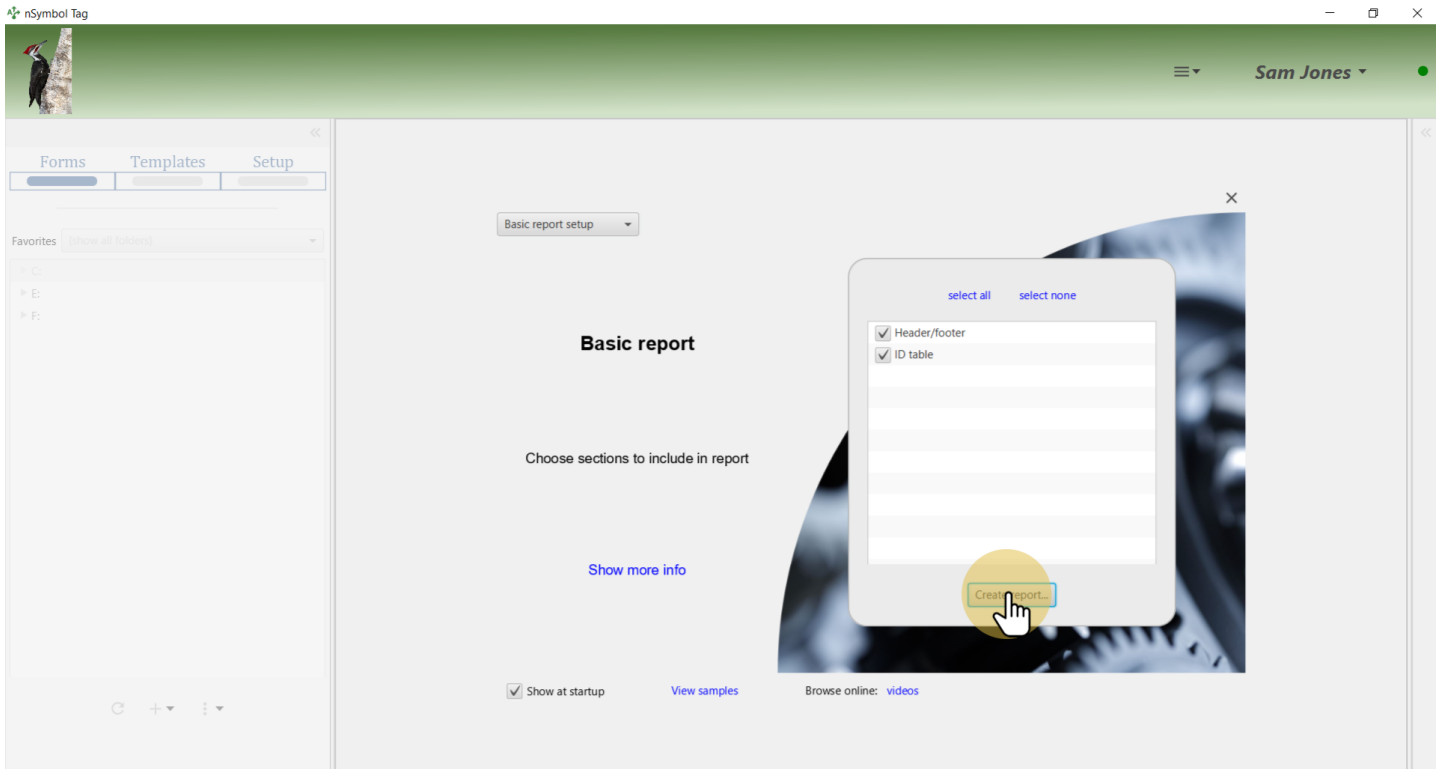
2 Show Basic report setup panel

The *Start* screen lets you open all available setup panels. For this guide, select the *Basic report setup* panel.



3 Generate a basic report

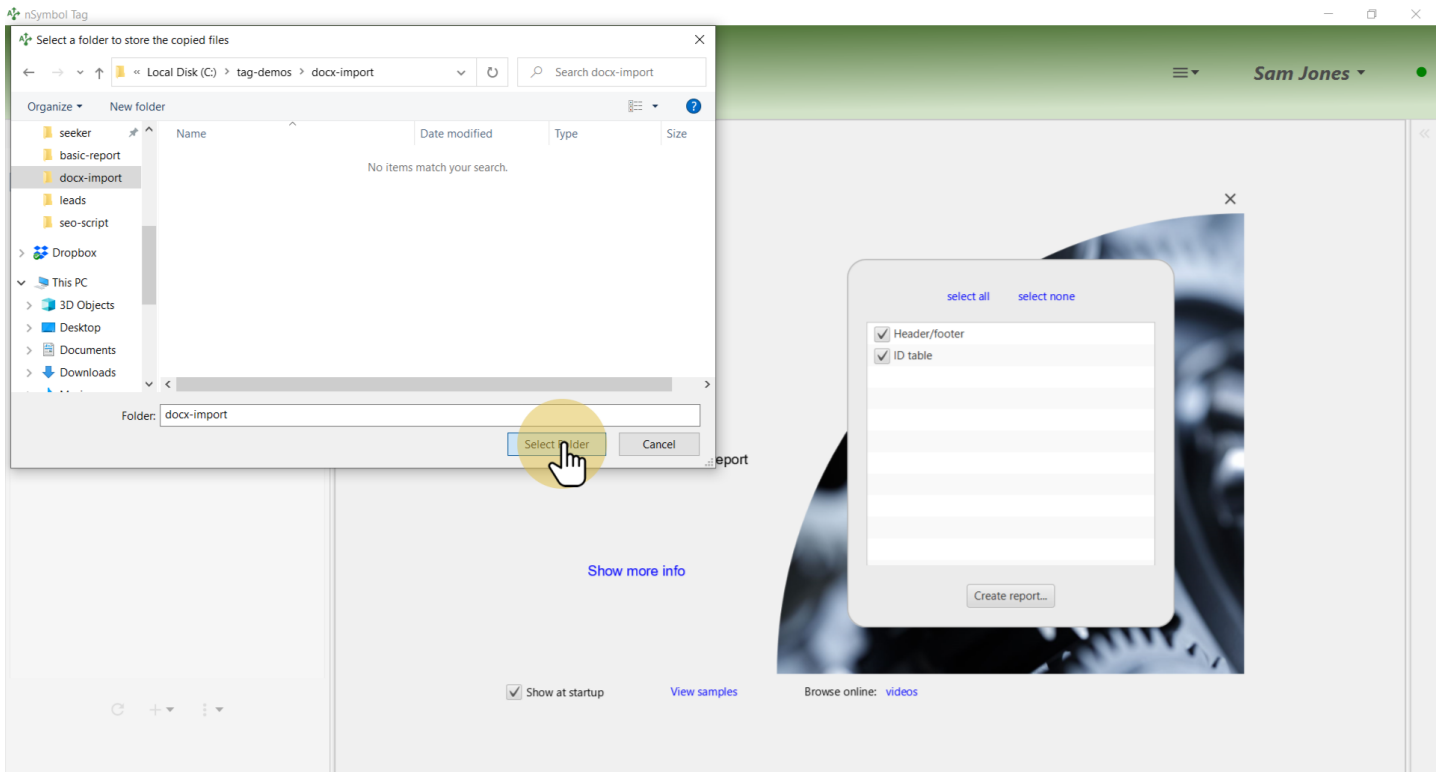
When a report is generated other files are copied as well. This guide will use two of those files and ignore the generated report itself. The needed files could also be copied using the *Samples app*.





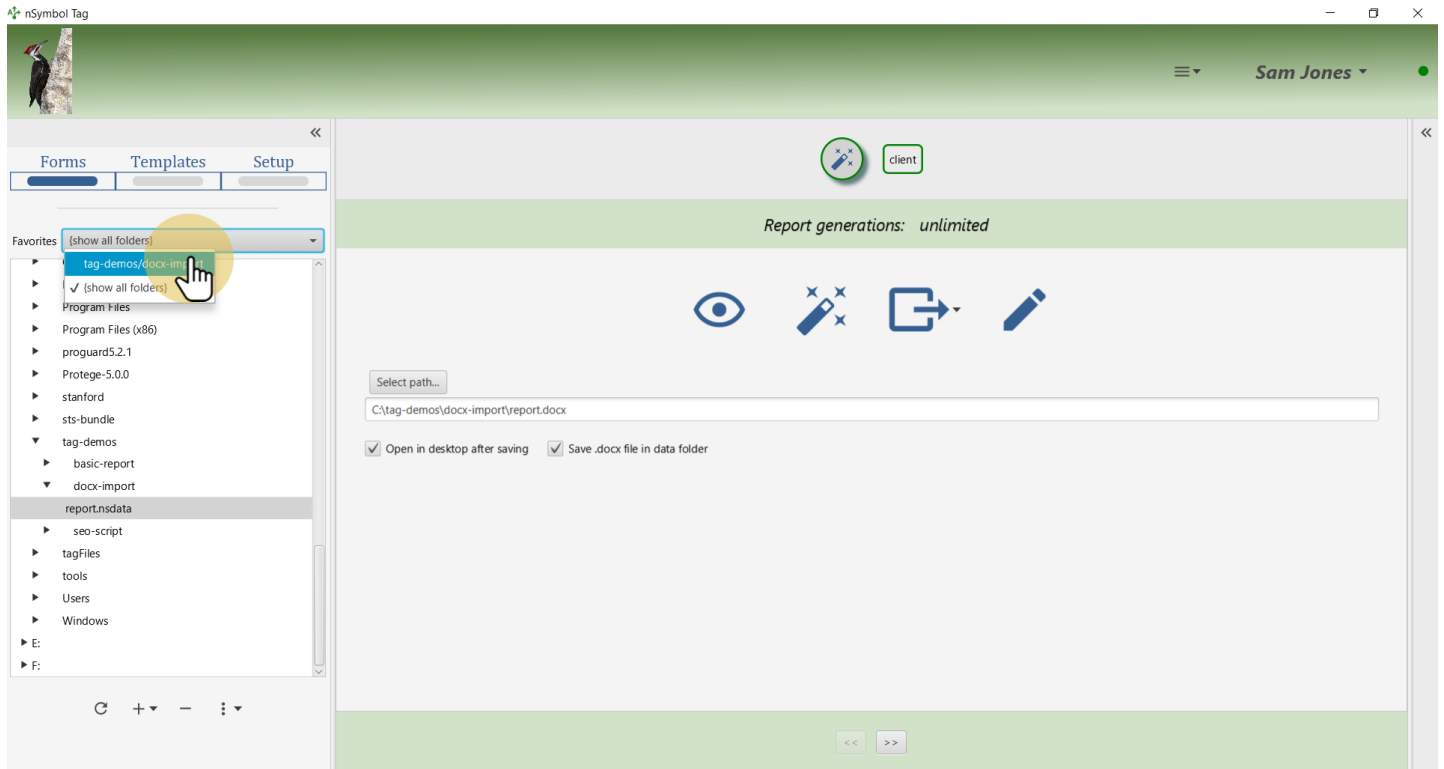
4 Select a folder

Select a folder using the standard Windows or Mac file selection dialog.



5 Select a favorite folder

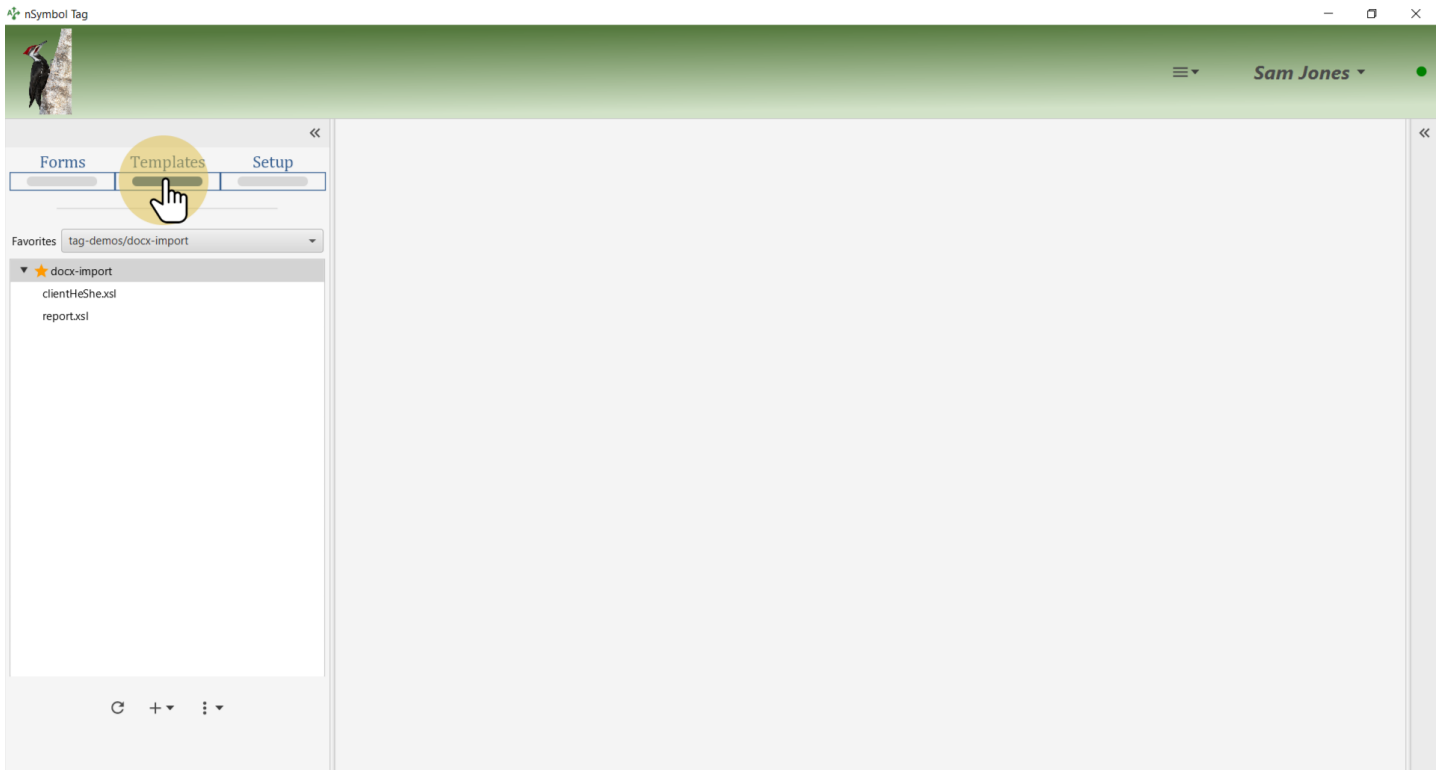
When the report is created, the folder you selected is also marked as a favorite if possible. Select this folder in the *Favorites dropdown* list to reduce screen clutter.





6 Go to Templates screen

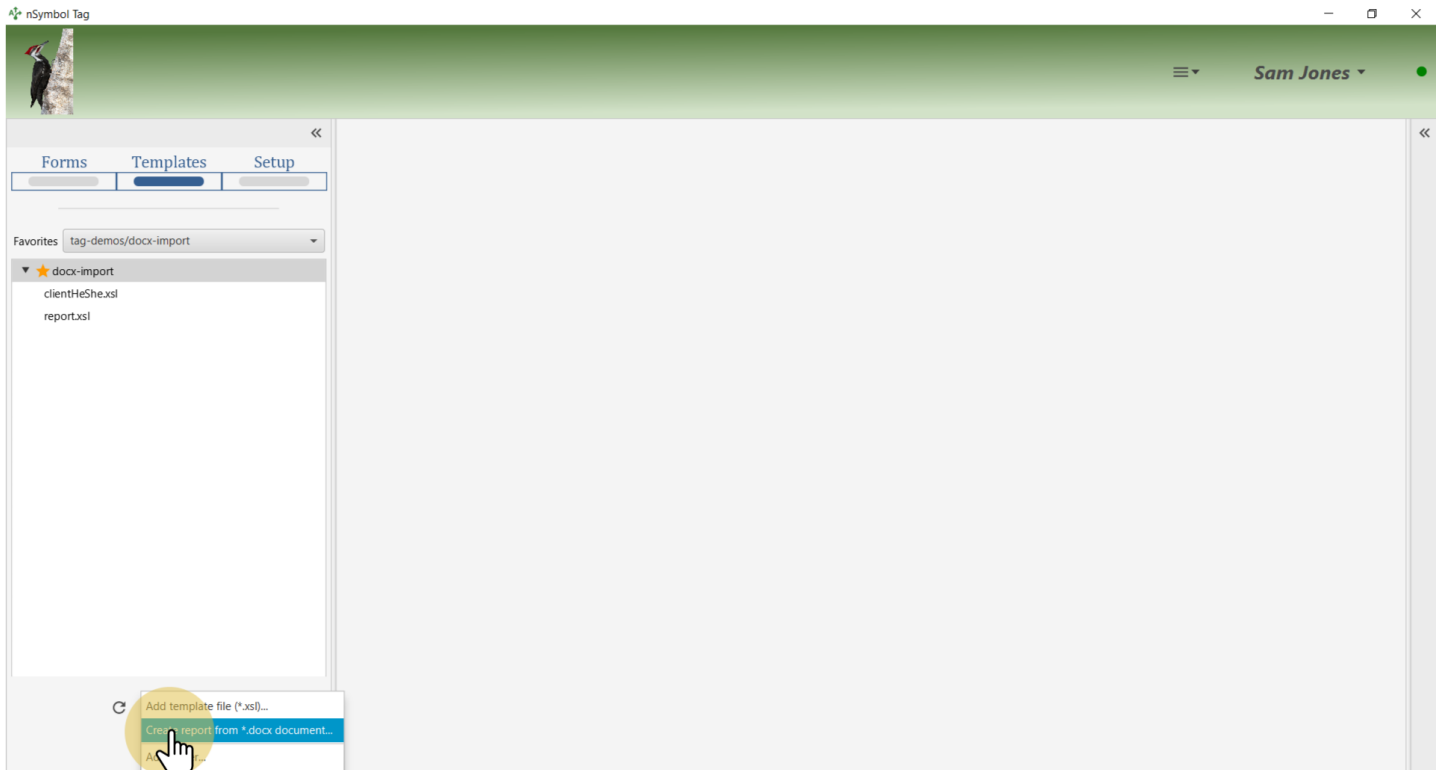
Go to the *Templates* screen where *.docx files can be imported.





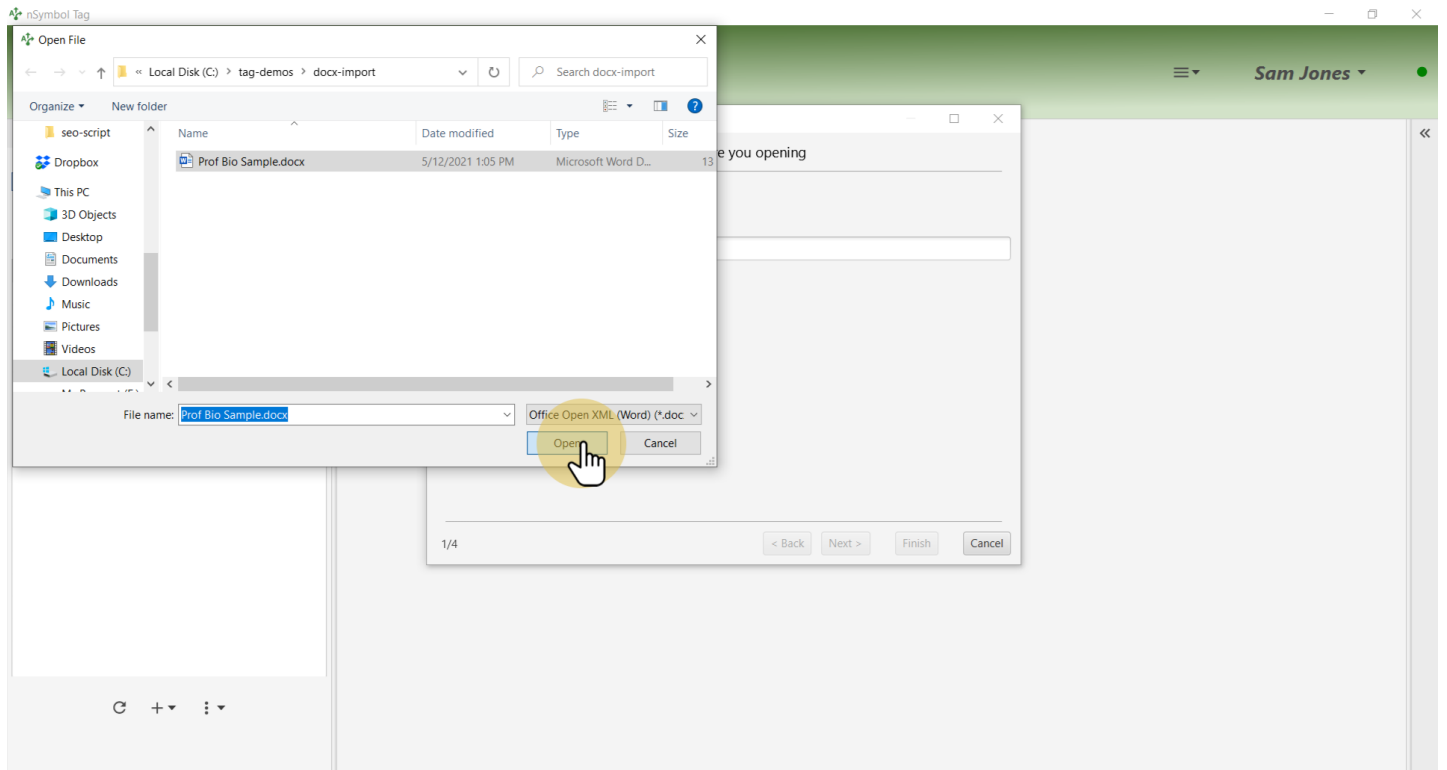
7 Open import wizard

Use the *Create report from *.docx document...* menu item to open an import wizard.



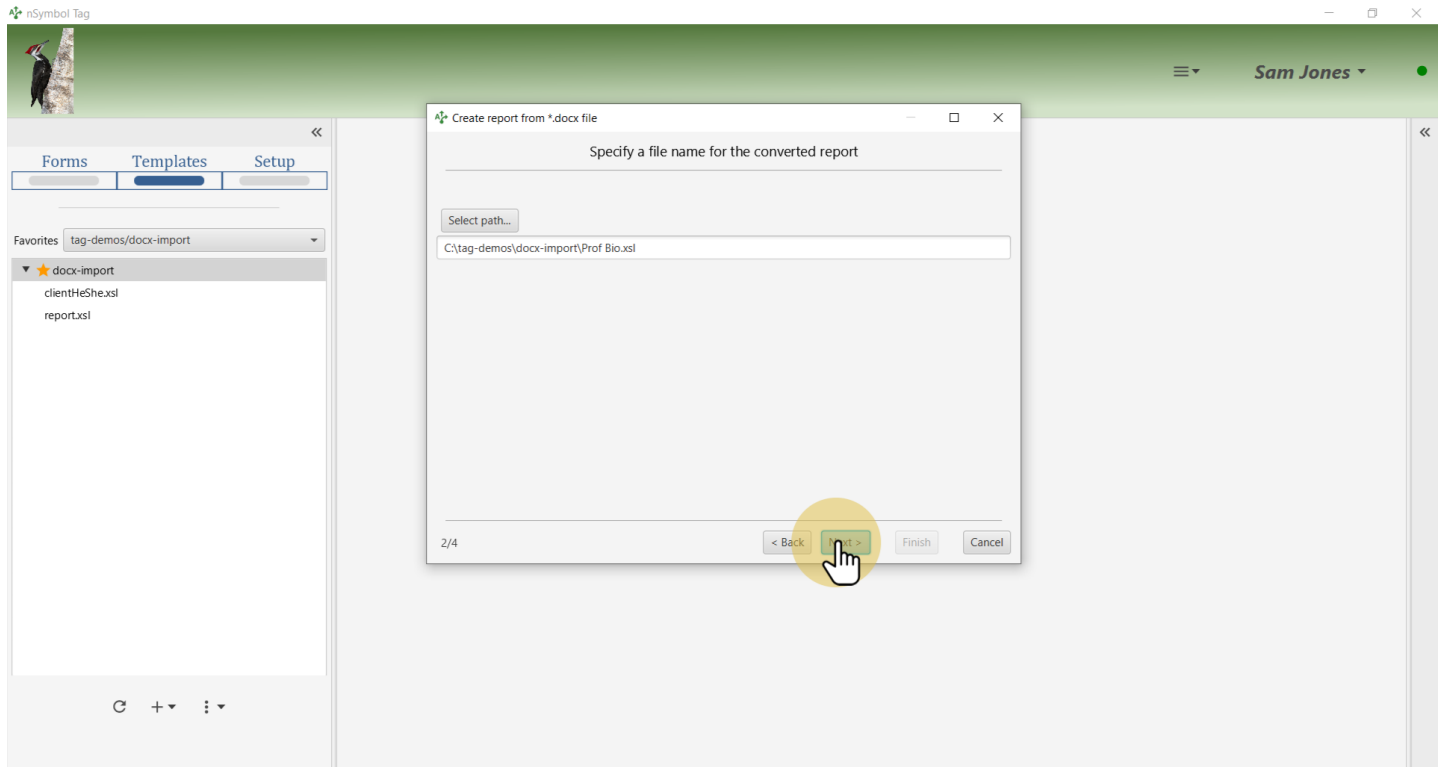
8 Select a file to import

Select a *.docx file to import using the standard Windows or Mac file selection dialog.



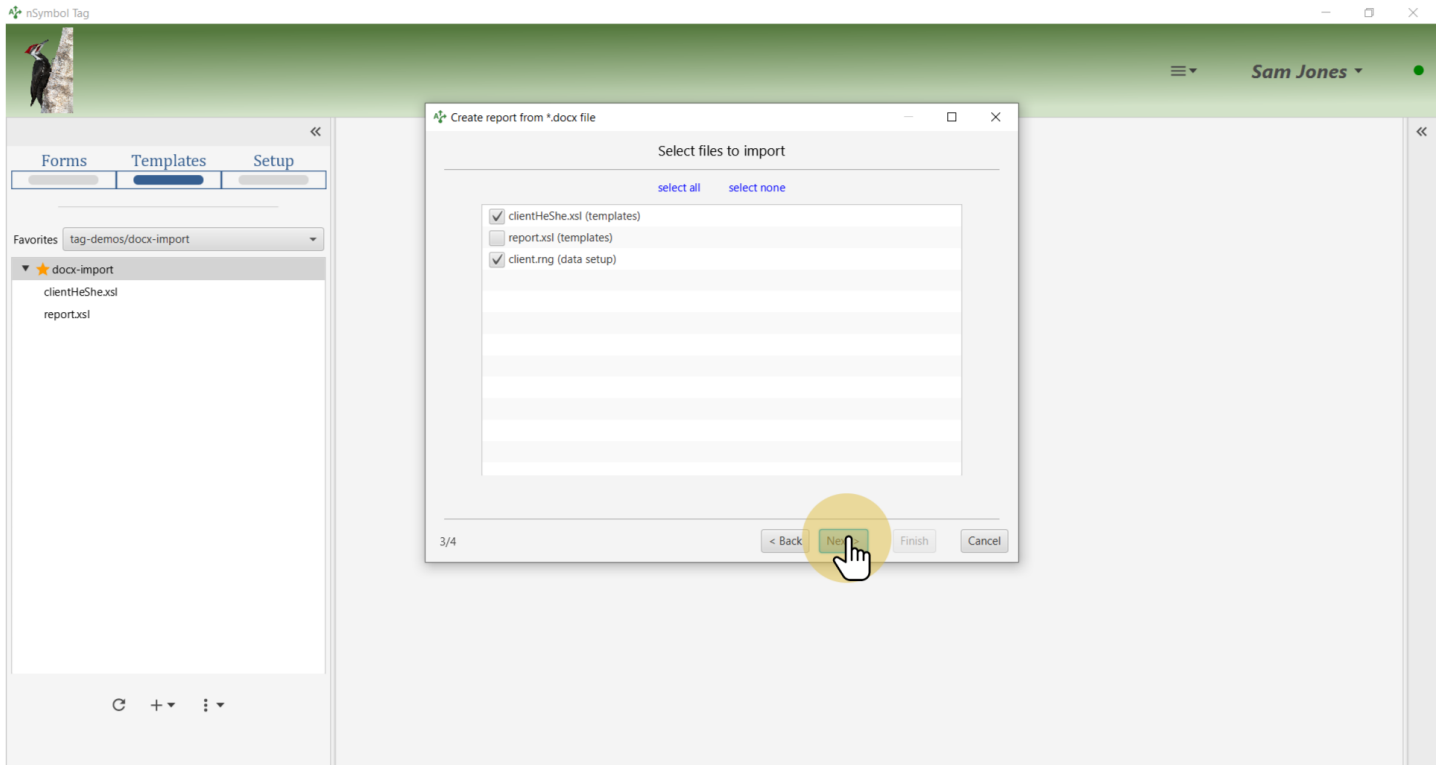
9 Specify a file to save imported content

The contents of the *.docx file will be imported into the start template of a report (template file). Here the term "Sample" was removed from the file name.



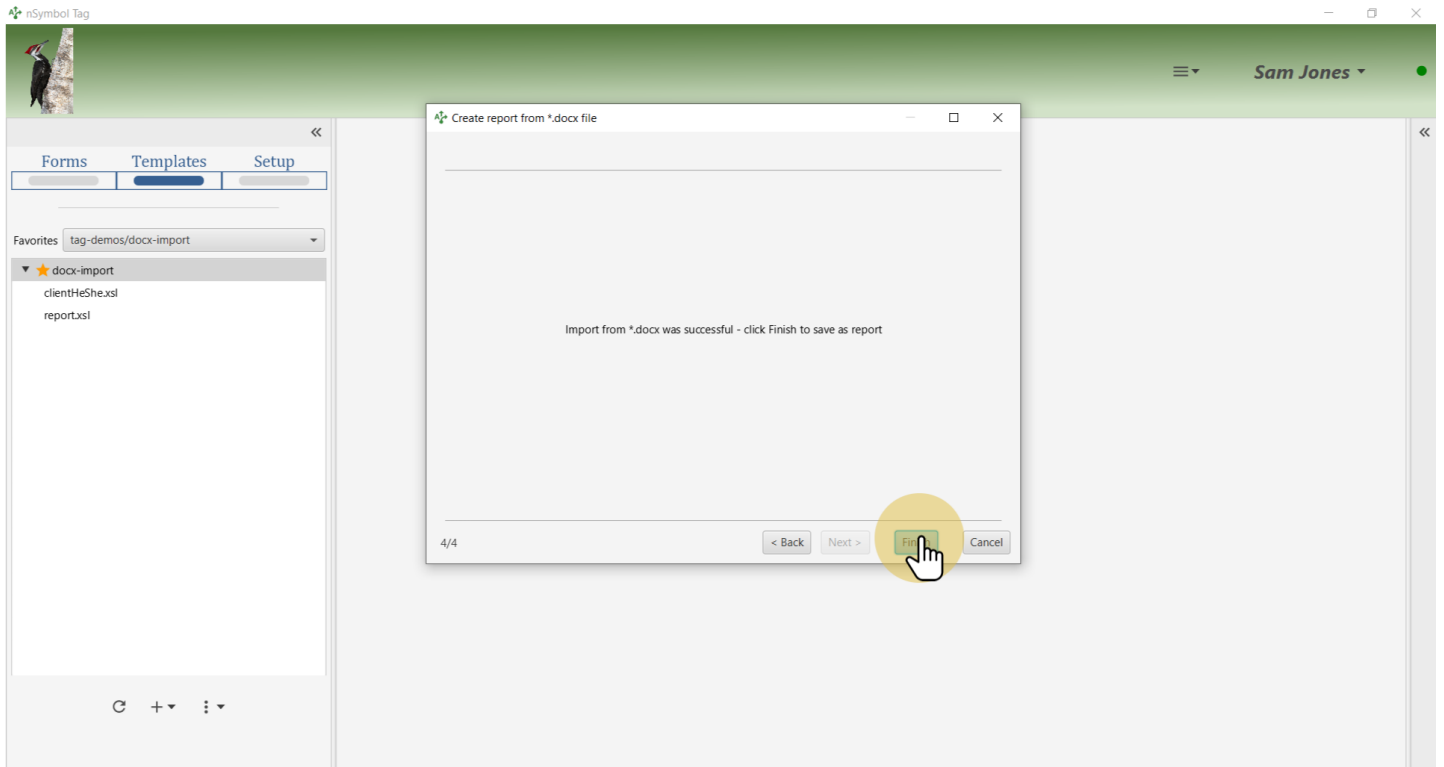
10 Select files to import

This step is where the copied files mentioned earlier get used. Import clientHeShe.xsl and client.rng while ignoring report.xsl (which can be deleted).



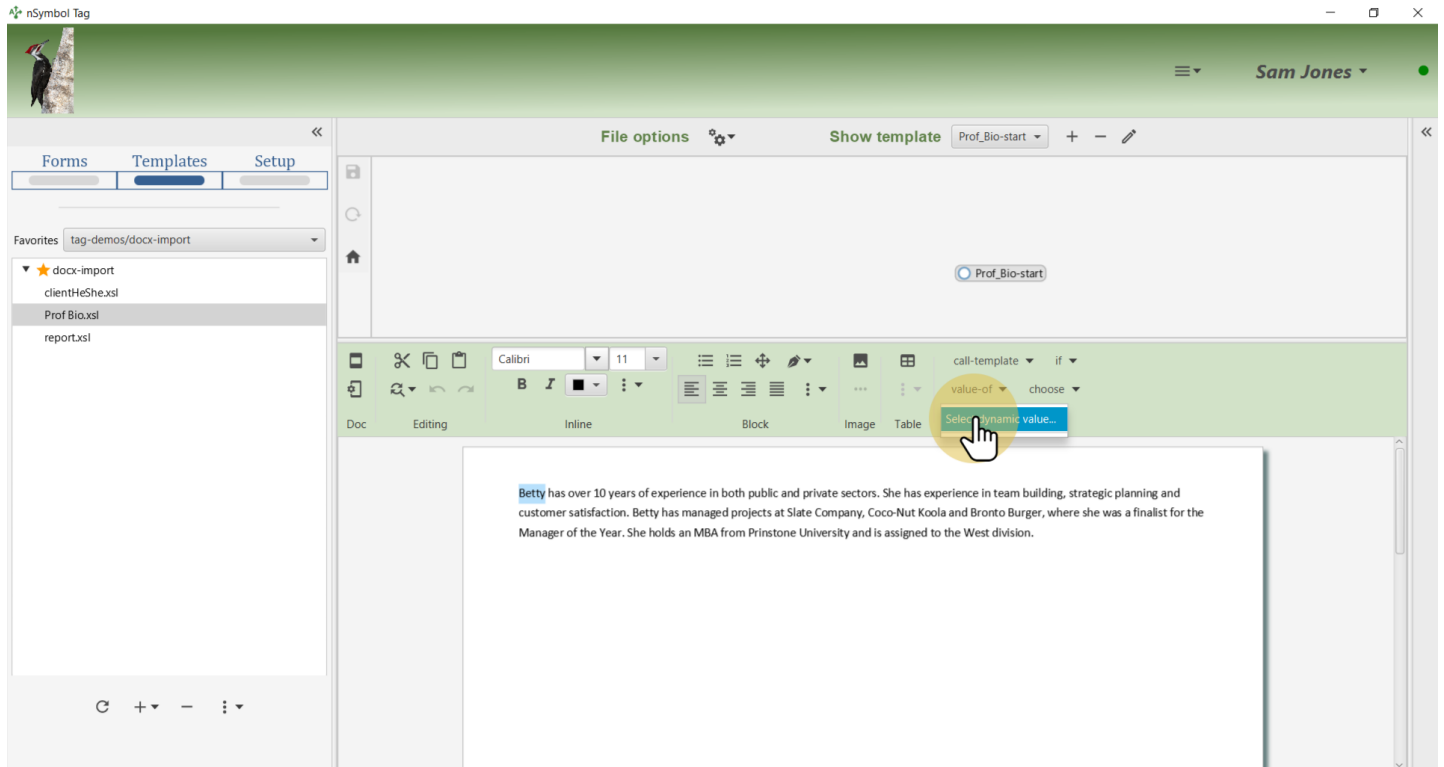
11 Save the report

At this point you know that the import was successful. When the Finish button is clicked, the converted report will be saved to disk.



12 Replace name with value-of

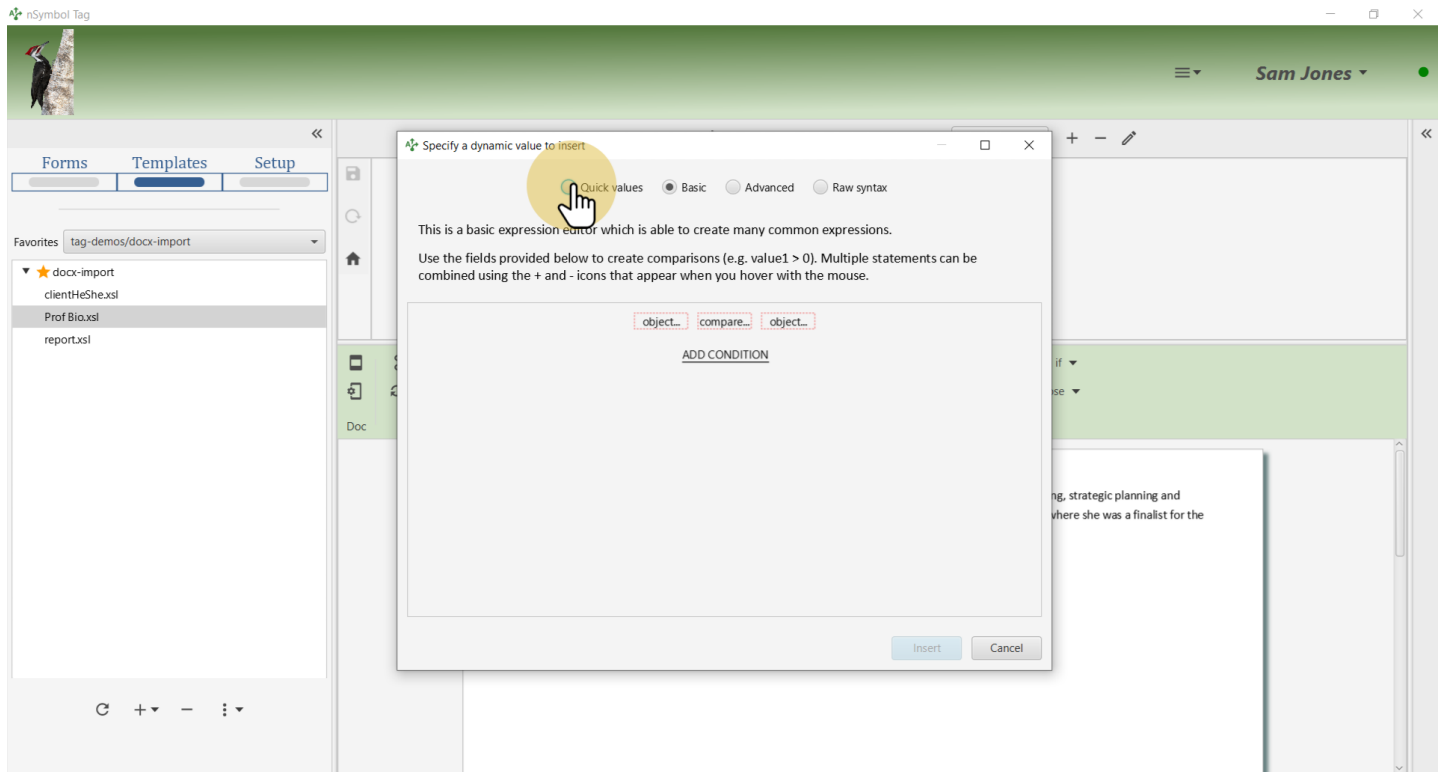
Select the first occurrence of "Betty". Use the *Select dynamic value...* menu item under the value-of menu to open the expression editor dialog.



The screenshot shows the nSymbol Tag editor interface. The top bar displays the user name "Sam Jones". The left sidebar contains a "Favorites" list with items like "tag-demos/docx-import", "docx-import", "clientHeShe.xsl", "Prof Bio.xsl", and "report.xsl". The main editing area shows a document with a paragraph of text: "Betty has over 10 years of experience in both public and private sectors. She has experience in team building, strategic planning and customer satisfaction. Betty has managed projects at Slate Company, Coco-Nut Koola and Bronto Burger, where she was a finalist for the Manager of the Year. She holds an MBA from Prinstone University and is assigned to the West division." The word "Betty" is highlighted in blue. The "value-of" menu is open, and the "Select dynamic value..." option is highlighted with a mouse cursor. The interface also shows a "File options" menu, a "Show template" dropdown set to "Prof_Bio-start", and a rich text editor toolbar with various formatting options.

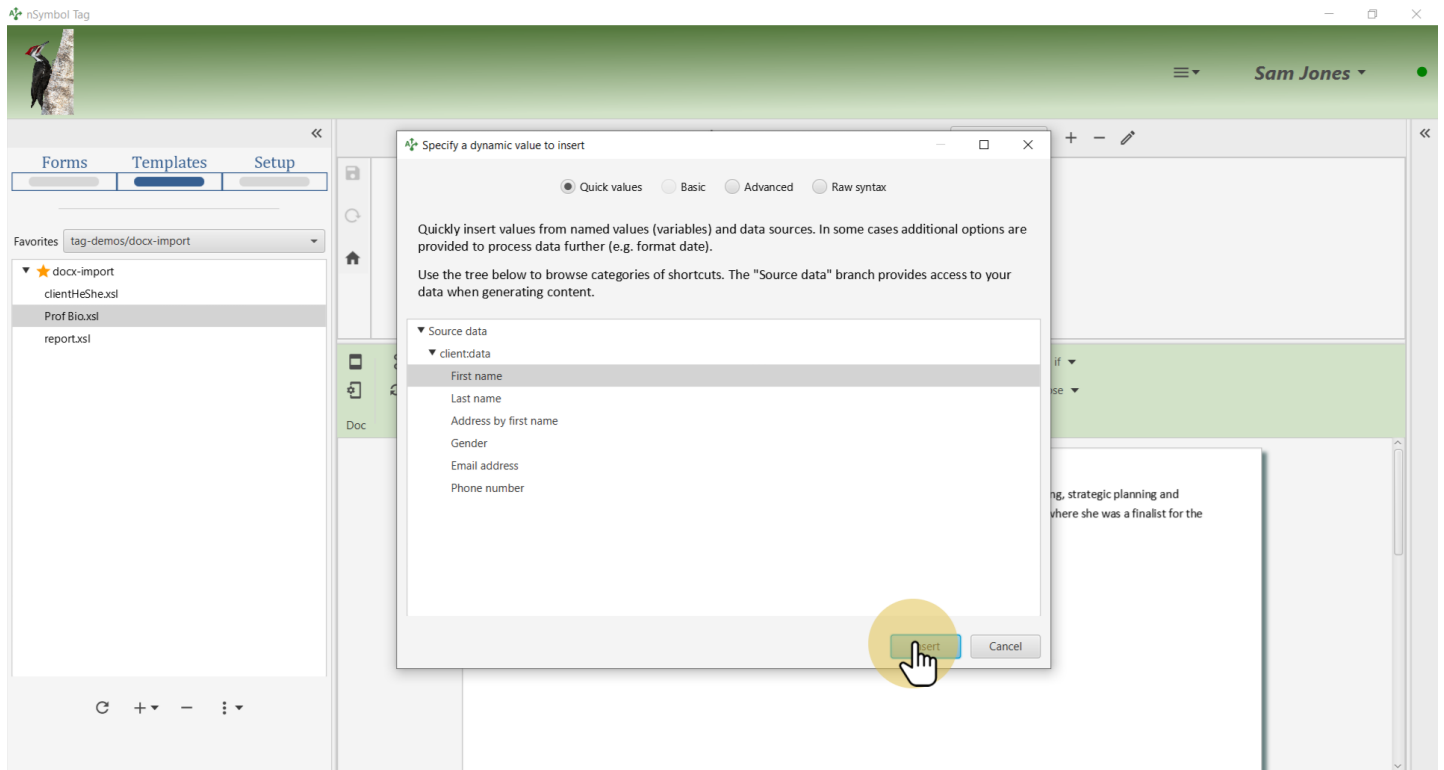
13 Go to Quick values panel

Select the *Quick values panel* which lists current data fields in a tree.



14 Select first name field

Expand the *Source data tree*, select the "First name" branch and click the *Insert* button.



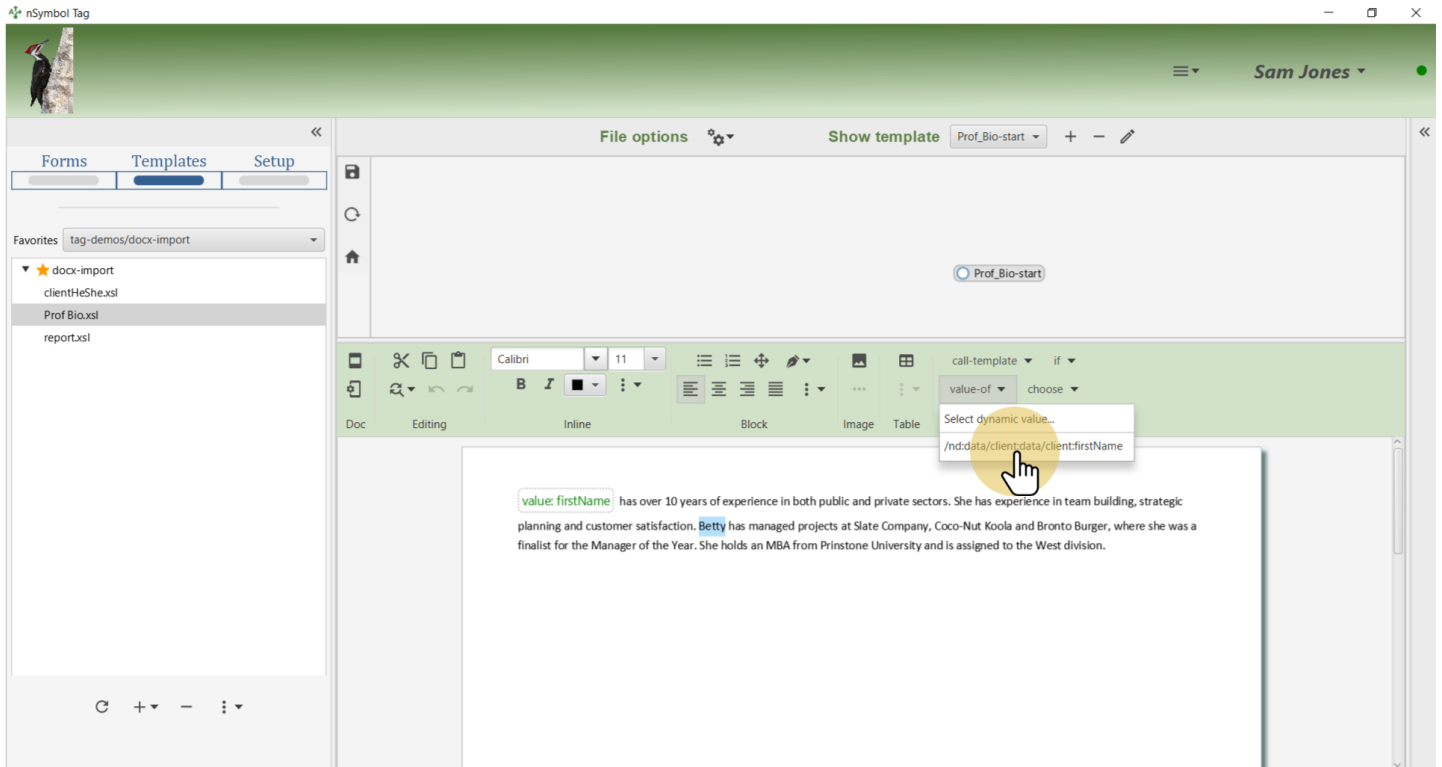
The screenshot shows the nSymbol Tag application interface. A dialog box titled "Specify a dynamic value to insert" is open in the center. The dialog has four radio buttons: "Quick values" (selected), "Basic", "Advanced", and "Raw syntax". Below the radio buttons, there is a text box with the following text: "Quickly insert values from named values (variables) and data sources. In some cases additional options are provided to process data further (e.g. format date). Use the tree below to browse categories of shortcuts. The 'Source data' branch provides access to your data when generating content." Below the text is a tree view with the following structure:

- Source data
 - clientdata
 - First name (highlighted)
 - Last name
 - Address by first name
 - Gender
 - Email address
 - Phone number

At the bottom right of the dialog box, there are two buttons: "Insert" and "Cancel". A yellow circle highlights the "Insert" button, and a hand cursor is pointing at it.

15 Replace next name occurrence

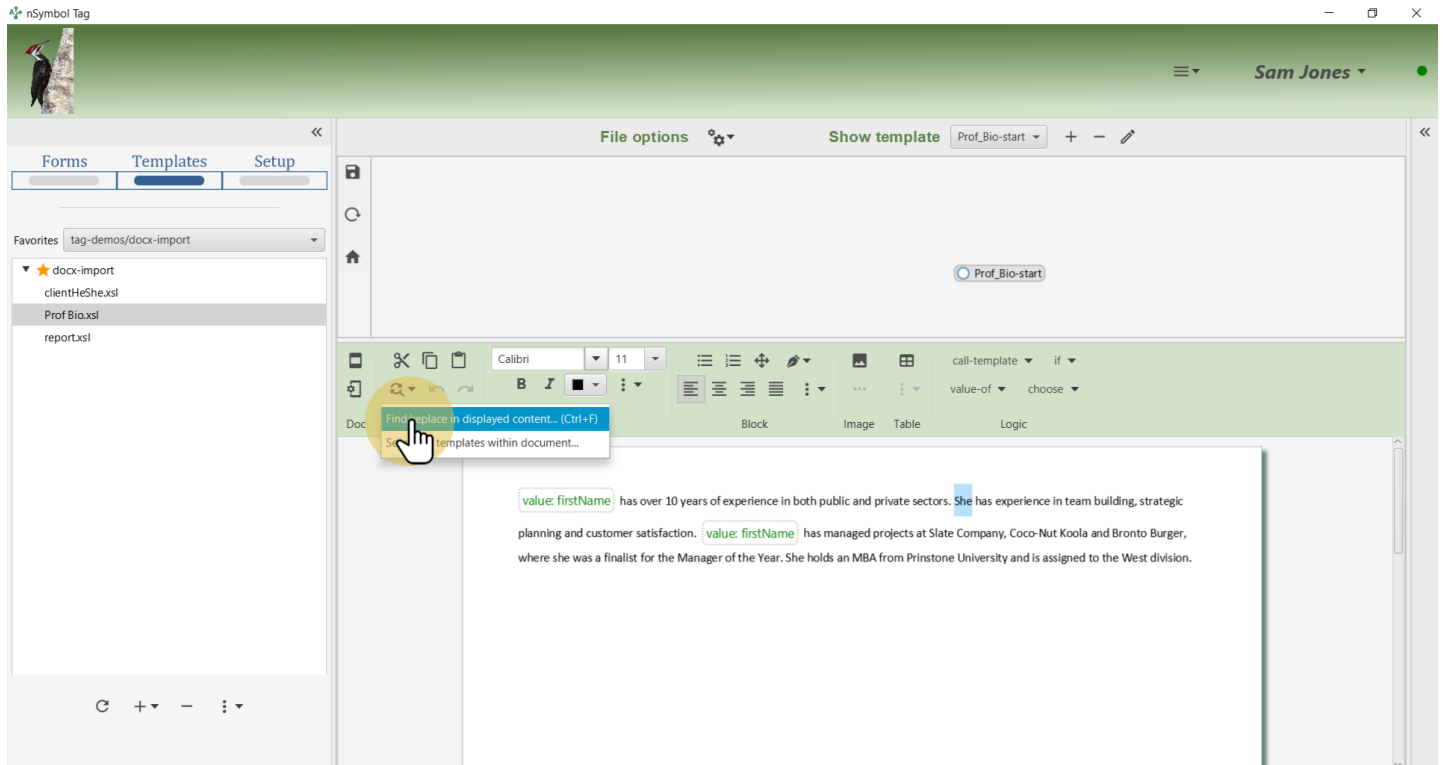
Select the next occurrence of "Betty" and open the value-of menu. Now there is a shortcut for the firstName field which you can use with a single click.



The screenshot shows the nSymbol Tag application interface. On the left, there is a sidebar with a 'Forms' tab selected, showing a list of templates including 'clientHeShe.xml', 'Prof Bio.xml', and 'report.xml'. The main editing area displays a document with a call-template 'Prof_Bio-start'. A context menu is open over the word 'Betty' in the text, showing options for 'value-of' and 'choose'. The 'value-of' option is selected, and a sub-menu is visible with the option 'Select dynamic value...' and a path '/nd:data/client:data/client/firstName'. A hand cursor is pointing at this option. The document text reads: 'value: firstName has over 10 years of experience in both public and private sectors. She has experience in team building, strategic planning and customer satisfaction. Betty has managed projects at Slate Company, Coco-Nut Koola and Bronto Burger, where she was a finalist for the Manager of the Year. She holds an MBA from Prinstone University and is assigned to the West division.'

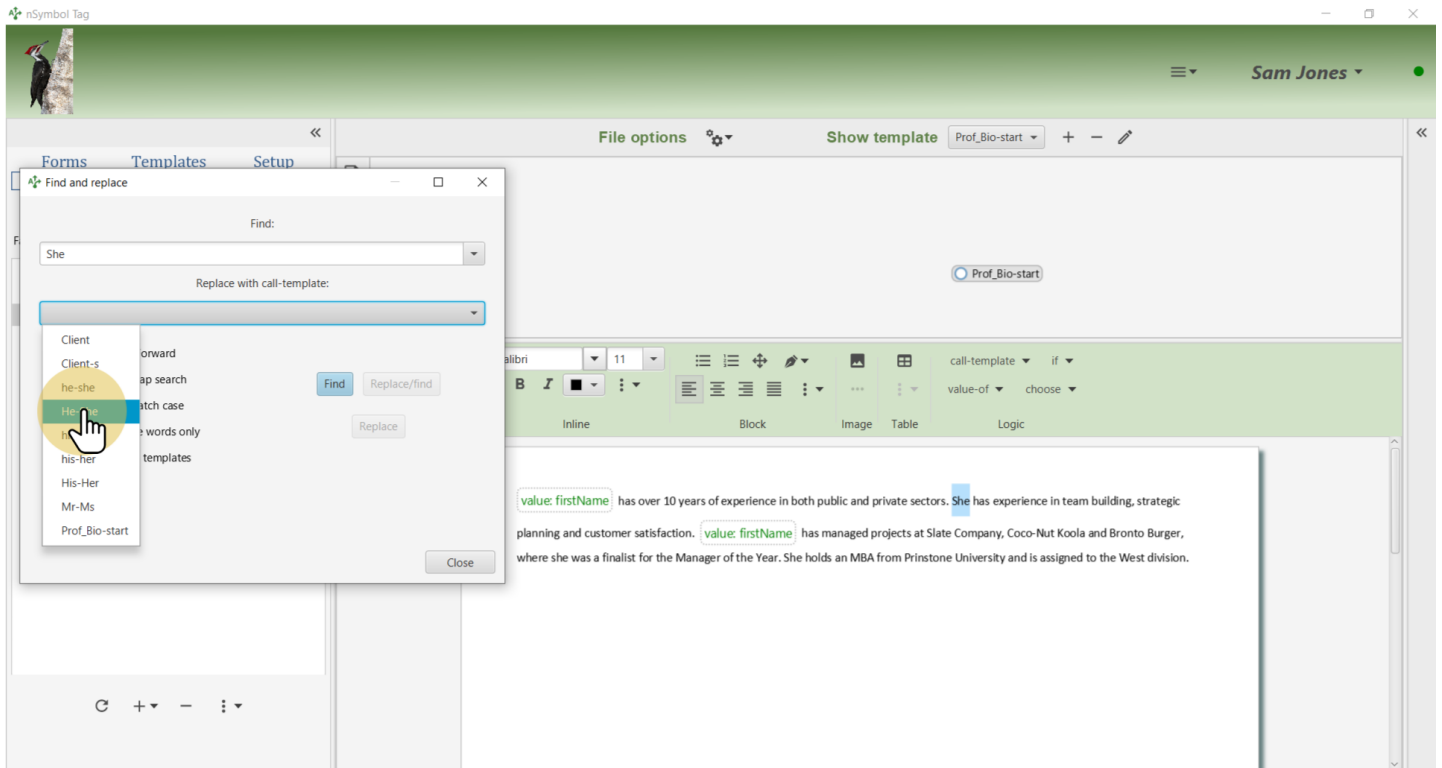
16 Open find/replace dialog

Select "She" and open the find/replace dialog using the *Find/replace in displayed content...* menu item under the *find/replace* tool.



17 Call the He-She template

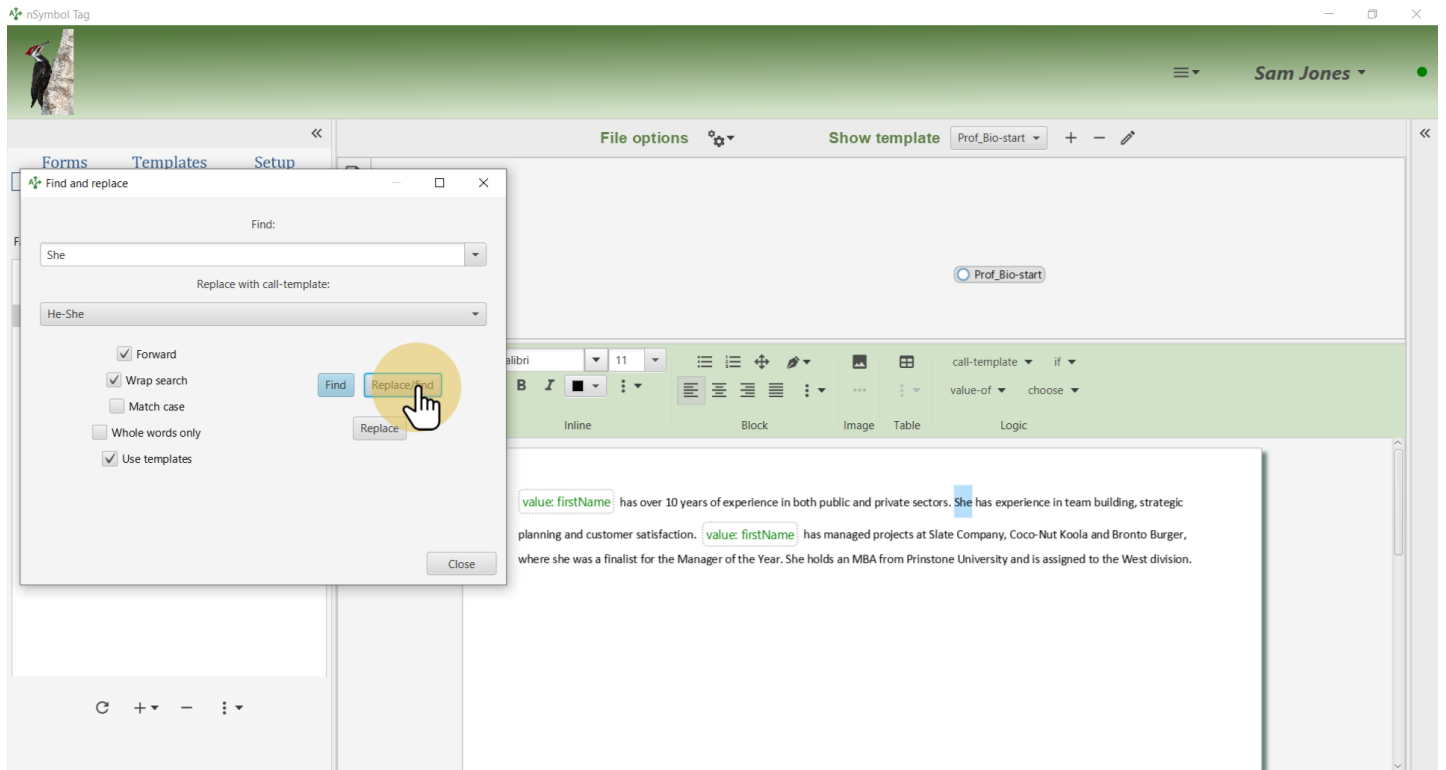
Select the *Use templates* checkbox and choose the He-She template from the dropdown list.



The screenshot displays the nSymbol Tag application interface. A 'Find and replace' dialog box is open, showing the 'Find' field with the text 'She'. The 'Replace with call-template:' dropdown menu is expanded, listing various templates. The 'He-She' template is highlighted, and a mouse cursor is pointing at it. The background shows the main document editor with a text block containing a call template: `value: firstName` has over 10 years of experience in both public and private sectors. `She` has experience in team building, strategic planning and customer satisfaction. `value: firstName` has managed projects at Slate Company, Coco-Nut Koola and Bronto Burger, where she was a finalist for the Manager of the Year. She holds an MBA from Prinstone University and is assigned to the West division.

18 Click Replace/find

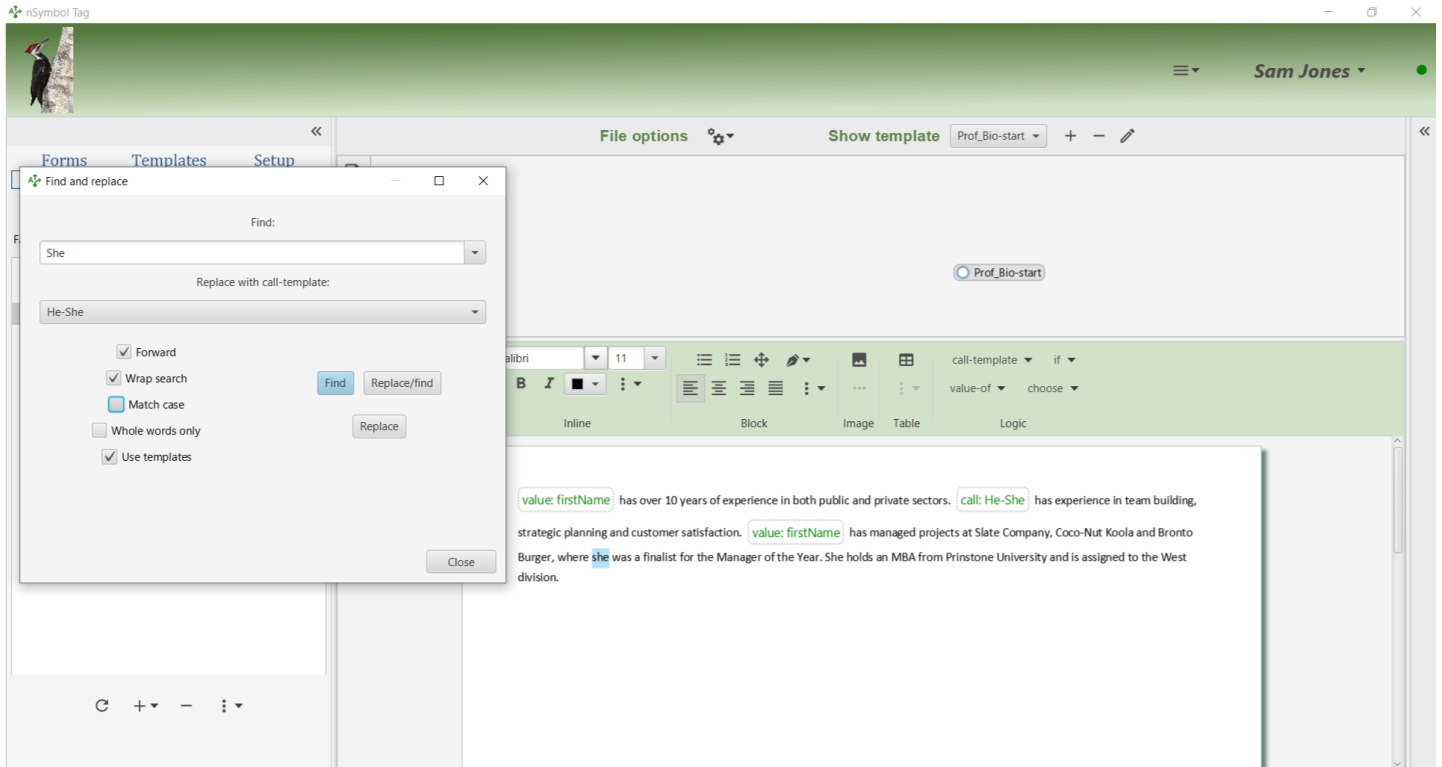
Click the *Replace/find* button to insert a call-template instruction and find the next occurrence of "She".



The screenshot displays the nSymbol Tag editor interface. A "Find and replace" dialog box is open, showing the search term "She" and the replacement call-template "He-She". The dialog includes options for search direction (Forward), wrap search, match case, whole words only, and use templates. The "Replace/find" button is highlighted with a yellow circle and a hand cursor, indicating the action to be performed. The background shows the editor's main workspace with a document containing text and call-template instructions like "value: firstName" and "Prof_Bio-start".

19 Adjust find preferences

By default *Match case* is false, and therefore the next "she" is selected. This is incorrect because the lowercase he-she should be used instead. Select the *Match case* checkbox and also the *Whole words only* checkbox (which often comes in handy). Continue with finding and replacing until done.

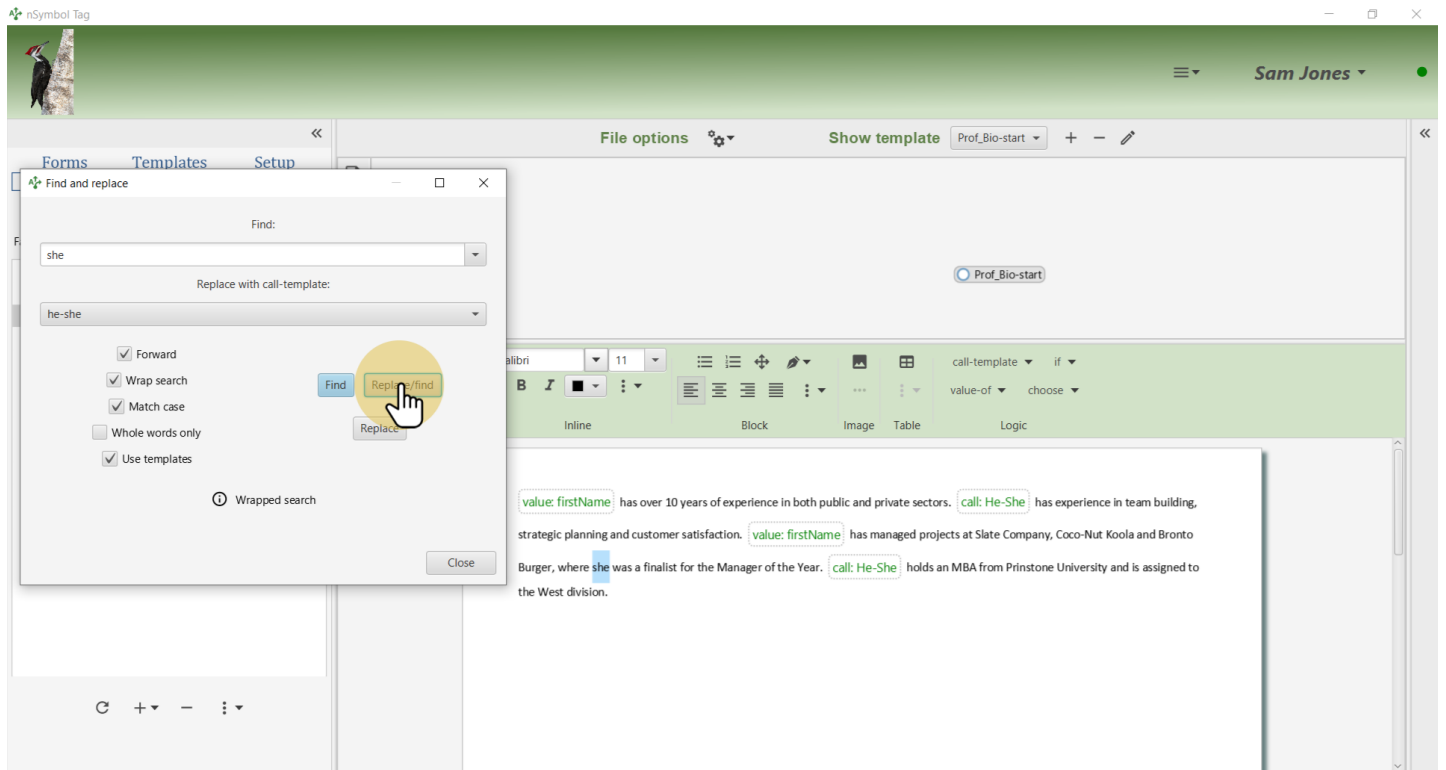


The screenshot shows the nSymbol Tag application interface. A "Find and replace" dialog box is open in the foreground. The "Find:" field contains the text "She". The "Replace with call-template:" field contains "He-She". The dialog has several checkboxes: "Forward" (checked), "Wrap search" (checked), "Match case" (checked), "Whole words only" (checked), and "Use templates" (checked). There are "Find", "Replace/find", and "Replace" buttons, along with a "Close" button at the bottom right of the dialog.

The background shows a document editor with a green header bar containing the name "Sam Jones". Below the header is a toolbar with various icons. The main text area contains a bio for "Sam Jones" with some text highlighted in green. The highlighted text includes "value: firstName" and "call: He-She".

20 Repeat for he-she

Repeat the last step replacing all occurrences of "she" with a he-she call-template.



The screenshot shows the nSymbol software interface. A 'Find and replace' dialog box is open, with the following settings:

- Find: she
- Replace with call-template: he-she
- Forward:
- Wrap search:
- Match case:
- Whole words only:
- Use templates:
- Wrapped search:

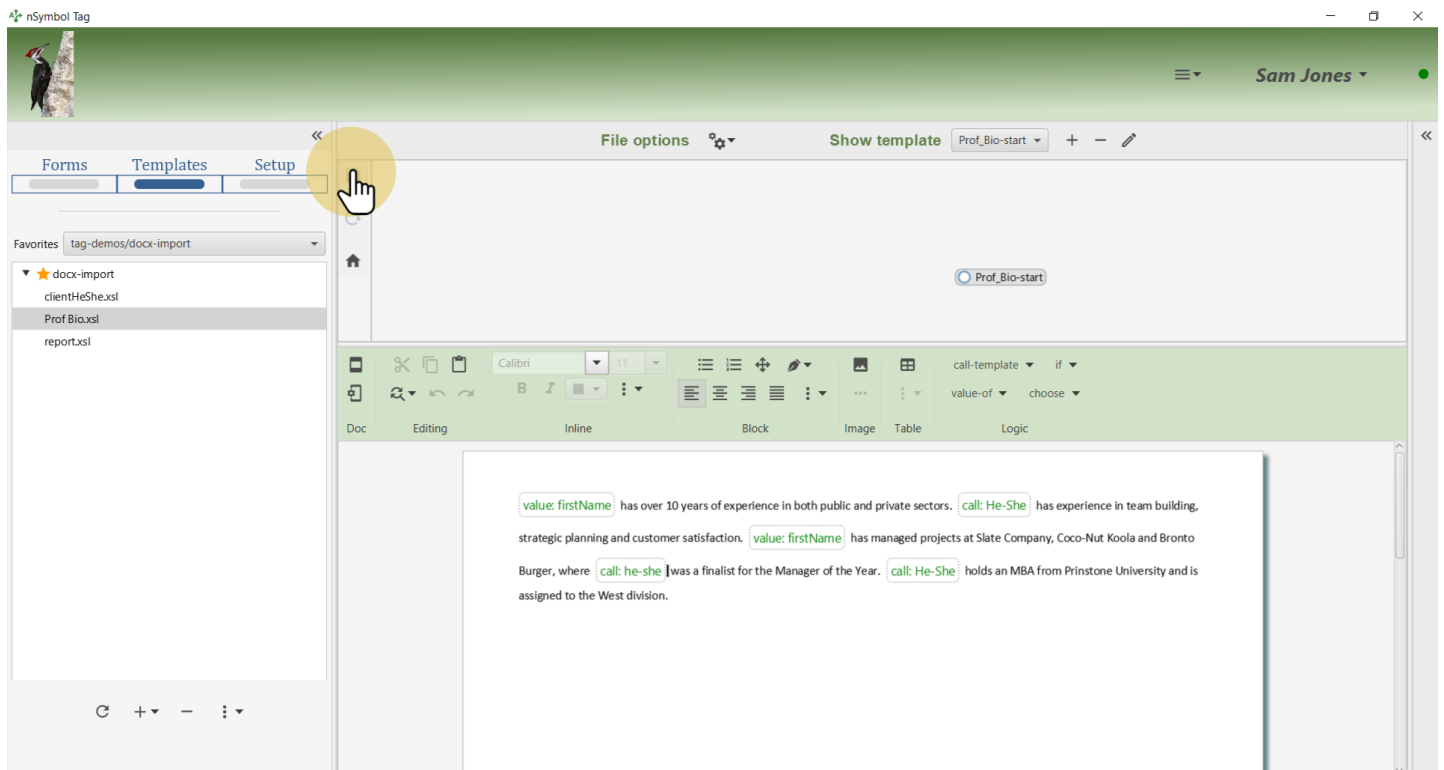
The 'Replace/find' button is highlighted with a yellow circle and a hand cursor. The background shows a document with call-templates like 'value: firstName' and 'call: He-She'.



21 Save imported report

Save the document after making all changes. Notice the logic bubbles that have replaced hard-coded names and pronouns.

Note that this is not yet a realistic example because skills and experience are still static. Depending upon your goals, these could be made dynamic using templates or dynamic lists which are beyond the scope of this guide.



22 All done

That's it for this guide. You can now add more fields to the data setup files, edit content, or enter data to generate draft documents.

