



BPA
Platform

Technical Overview

Format as HTML Tool

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Head Office:

Codeless Platforms

Suite 1 & 2 Bourne Gate

25 Bourne Valley Road

Poole

BH12 1DY

United Kingdom

Tel: +44 (0) 330 99 88 700

Email: enquiries@codelessplatforms.com

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Introduction

The **Format as HTML** tool is used to create a task step that produces single or multiple HTML documents. You can choose to create the HTML template from scratch or import a pre-existing template. Recordsets and other task step properties can also be used to populate the HTML template to produce dynamic content documents. These documents can then be consumed and then delivered by Output or Execute task steps.

Features

- ▶ Create or use existing HTML documents
- ▶ Merge data from other task steps
- ▶ Full support for embedded graphics and backgrounds
- ▶ Create single or multiple documents depending on the information
- ▶ Document preview
- ▶ HTML Table Designer
 - ☐ Data formatting
 - ☐ Hyperlink support
 - ☐ Auto-hyperlink detection for dynamic data
 - ☐ Formatting of fonts, borders, colours, backgrounds
 - ☐ Sub- and grand total

Technical Summary







NOTE: The **Format as HTML** tool supports basic HTML features. For new development, including HTML 4.0 and HTML 5 support, we recommend using the **Format as HTML Pro** (for more information, refer to the *Format as HTML Pro White Paper*).

Working with other Tools

The **Format as HTML** tool can directly interact with the following tools:

Consuming From Other Tools

The **Format as HTML** tool can consume objects outputted by the following tools:

Icon	Tool Name	Tool Category
	Database Query (ODBC)	Input and Data Connectors
	Database Query (OLEDB)	Input and Data Connectors
	Call Stored Procedure (OLEDB)	Input, Data Connectors, Output, and Execute
	Import Flat File	Input
	Convert XML to Recordset	Format
	Filter Data	General

NOTE: The **Format as HTML** can only consume from the **Call Stored Procedure (OLEDB)** tool when it is outputting recordsets.







Objects Consumed

The following objects, outputted by the above tools, can be directly consumed by the **Format as HTML** tool:

- ▶ **Recordset** — Tabular data from any BPA Platform tool capable of exposing such data (see above)

Exposing to Other Tools

Objects exposed by the **Format as HTML** tool can be directly consumed by the following tools:

Icon	Tool Name	Tool Category
	Save File	Output
	Send Email (SMTP)	Output
	Transfer File (FTP)	Output
	Call COM Object	Execute
	Run External Program	Execute
	Run VBScript	Execute

Objects Exposed

The following objects, exposed by the **Format as HTML** tool, can be directly consumed by the above tools:

- ▶ **Documents (HTML)** — Standalone HTML pages
- ▶ **RecordSource** — If an **Input Recordset** has been selected (see [General tab](#)), this contains the columns included in the recordset
- ▶ **Step Properties** — Standard step properties are available allowing you to use statistical data of the tool

Global Configuration

The **Format as HTML** tool does not require any global configuration before being used in a task. However, it is recommended you create basic HTML templates for use in the task step — see [Formatting tab](#).

HTML Editor

Before you can edit HTML pages imported into the **Format as HTML** task step, you must assign a default HTML Editor. You do this in the operating system's Control Panel. Open **Internet Options > Programs tab**, and from the **HTML editing** section, select **Notepad**.

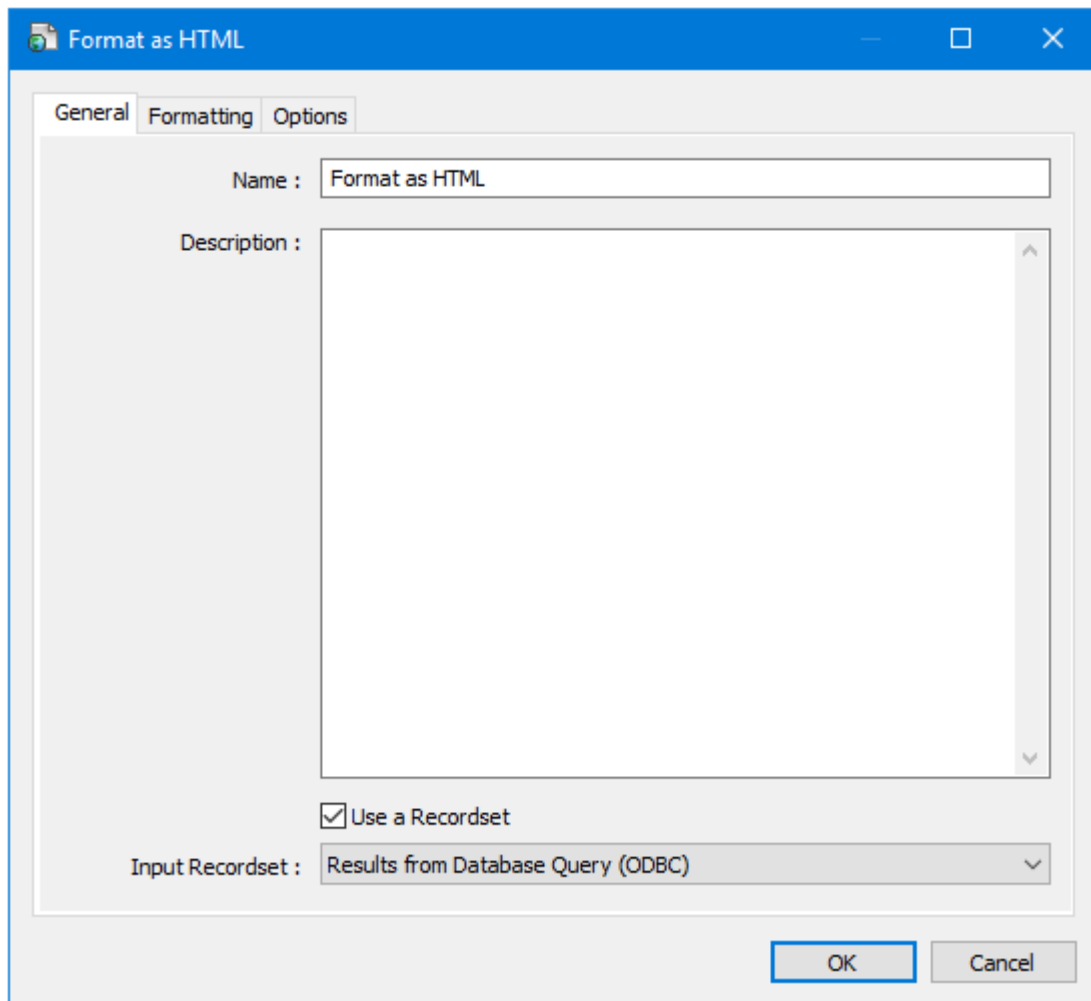
Step Configuration

To add a new **Format as HTML** step to an existing task, you either:

- ▶ Click and drag the **Format as HTML** icon from the **Task Browser** to the task **Design** area.
- ▶ From the task's **Design** tab, right-click on empty space and select **Add > Format > Format as HTML**.

For a detailed description of how to create new tasks, refer to the product help.

About the General Tab

The image shows a screenshot of a software dialog box titled "Format as HTML". The dialog has a blue header bar with the title and standard window controls (minimize, maximize, close). Below the header, there are three tabs: "General", "Formatting", and "Options", with "General" being the active tab. The "General" tab contains the following elements: a "Name" label followed by a text box containing "Format as HTML"; a "Description" label followed by a large, empty text area with a vertical scrollbar on the right; a checked checkbox labeled "Use a Recordset"; and an "Input Recordset" label followed by a dropdown menu showing "Results from Database Query (ODBC)". At the bottom right of the dialog are "OK" and "Cancel" buttons.

The **General** tab is used to enter the following details for the step:

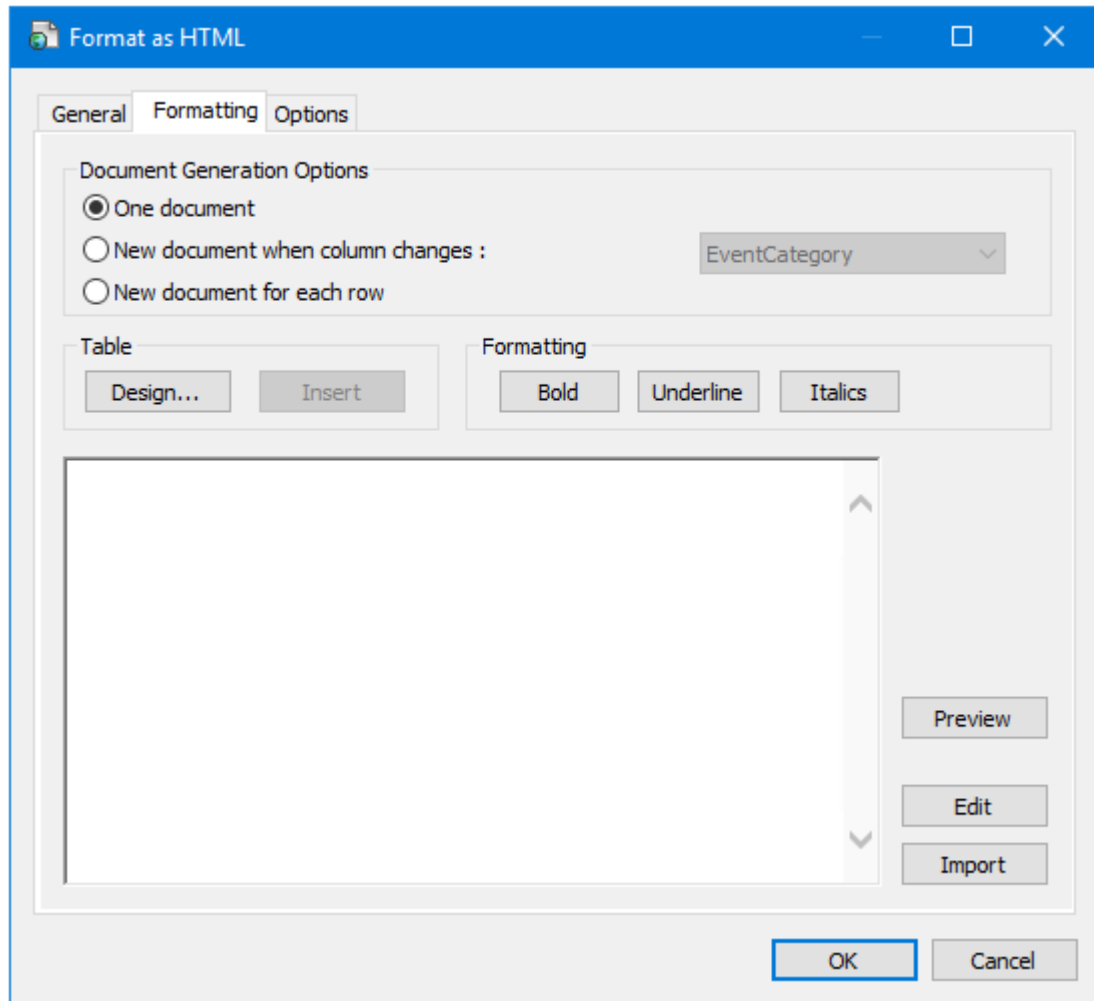
- ▶ **Name** — Enter a meaningful name for the step

TIP: If this task instance makes use of two or more **Format as HTML** steps, ensure the **Name** used is unique for each individual step.

- ▶ **Description** — If required, enter a description of this step
- ▶ **Use a Recordset** — Enable this parameter if recordset data from a previous task step is required to form the document
 - ☐ **Input Recordset** — Contains all available recordsets from steps previously created in the task

About the Formatting Tab

Create your HTML documents in the **Formatting** tab.



If Not Consuming a Recordset

If the **Format as HTML** step is not set to consume a recordset from a previous task step (see [General tab](#)), you can only output a single HTML document at run-time.

You can still use variables, step properties, and other data from the Task Browser to generate dynamic data.

If Consuming a Recordset

If the **Format as HTML** step is set to consume a recordset from a previous task step (see [General tab](#)), you can output a single or multiple HTML documents.

One Document Generation

A single HTML document is created containing all records from the recordset.

New Document when Column Changes Generation

A new HTML document is created when the nominated recordset column's value changes. For example, column name `companyname` groups all the records where `companyname = "Codeless Platforms"` into one document and each subsequent company into a new document.

New Document for Each Row Generation

A new HTML document is created for each row in the consumed recordset.

Using the HTML Designer

Typically, you would **Import** an existing HTML template into the design area and add BPA Platform data from the Task Browser.

NOTE: Any text typed directly into the design area is treated as plain text; this includes any HTML constructs you may have added. Instead, click **Edit** to open the HTML template in Notepad — if you see a warning advising the HTML editor cannot be found or opened, go to **Control Panel > Internet Options > Programs tab** and select **Notepad** as the **HTML Editor**. However, recordset columns, variables, and step properties added to the template from the Task Browser remain as dynamic data placeholders rather than plain text.

If required, you can display recordset data as a table (not available if generating a **New document for each row**) — click **Design** to create the HTML table (see [About the HTML Table Designer](#)).

About the HTML Table Designer

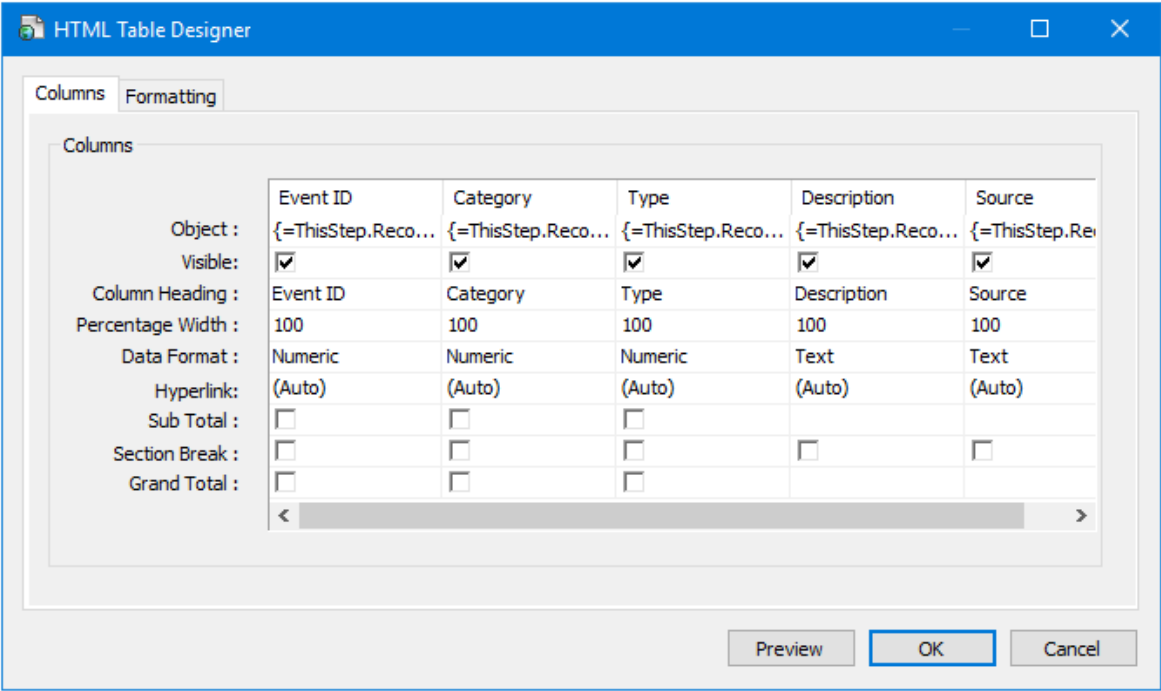
The **HTML Table Designer** is used to create an HTML table incorporating data from a consumed recordset from a previously created task step — see [General tab](#).

You add recordset columns in the [Columns tab](#) and style them in the [Formatting tab](#).

Use **Preview** to view the table during design time.

About the Columns Tab

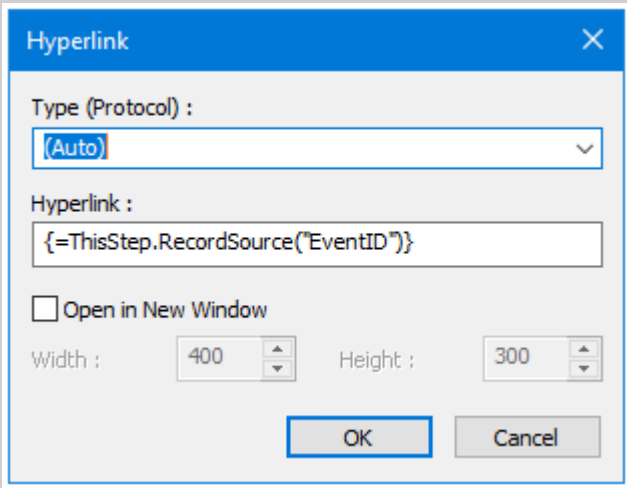
Here you specify the columns from the input recordset (see [General tab](#)) that make up the table.



Drag-and-drop recordset columns from the Task Browser to the design area. To change the column order, click and drag the relevant column to its new location.

Additional formatting is available for each column:

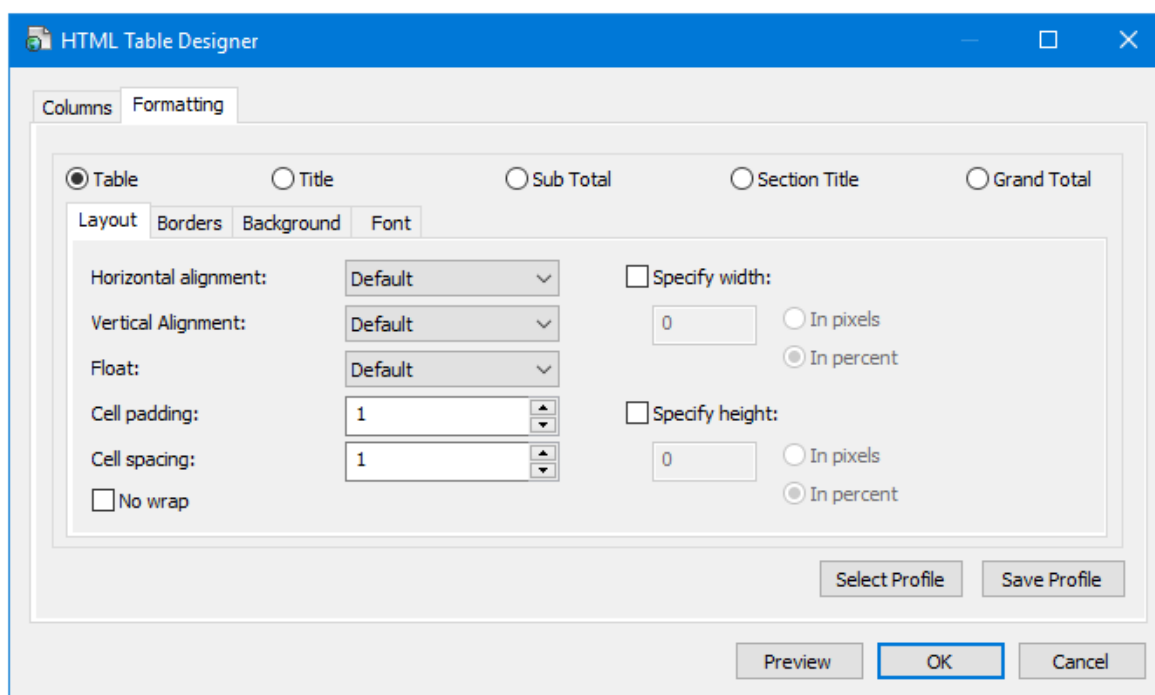
Format	Description
Object	The recordset source for this column, as VB script.
Visible	By default, all columns added to the table are visible in the output. Use the Visible toggle to add a recordset column that is used to calculate a sub-total but is not shown in the final output.
Column Heading	The column heading as displayed in the final output.
Percentage Width	The width of the column as a percentage of the entire table width. By default, each column is set to 100% so must be changed at design time to ensure best-fit. <div>TIP: Set Percentage Width to 0 to force the browser to use its own sizing algorithm.</div>

Format	Description
Data Format	<p>The data format of the recordset column. Use the ellipsis button to change the format:</p> <ul style="list-style-type: none"> ▶ Text ▶ Numeric ▶ Date/Time ▶ Currency <p>All data formats have additional formatting available where you can choose to use the same formatting available through your operating system, or use custom formatting for this particular column only. All standard formats are available.</p>
Hyperlink	<p>Recordset data containing links to websites or email addresses are automatically displayed in the table.</p>  <p>Use the ellipsis button to change the format:</p> <ul style="list-style-type: none"> ▶ Type (Protocol) <ul style="list-style-type: none"> <input type="checkbox"/> (None) — The data is not displayed as a hyperlink <input type="checkbox"/> (Auto) default — The hyperlink type is interpreted by the software and a suitable hyperlink type used <input type="checkbox"/> http:// — Links to a web page <input type="checkbox"/> file:/// — Links to a file <input type="checkbox"/> ftp:// — Links to a file on an ftp server <input type="checkbox"/> mailto: — Opens a new mail message ▶ Hyperlink — The script for this column's data source. ▶ Open in New Window — Whether to open the link in a new browser window. You can then specify the window's dimensions in pixels.

Format	Description
Sub Total	If the recordset column is either of Numeric or Currency data format, you can choose to add the values and display the value in a new row. Use Section Break to add a new sub-total row and value for a new set of table rows,
Section Break	Although available for every column, a section break should only be enabled for "sort" columns in either the Database Query (ODBC) or Database Query (OLEDB) task step. Every time the value of the column changes, a section break is added. This is particularly useful when using sub-totals.
Grand Total	If the recordset column is either of Numeric or Currency data format, you can choose to add the values and display the value at the bottom of the table.

About the Formatting Tab

Use the **Formatting** tab to style the HTML table.



If after you've finished formatting this table, you want to re-use the formats for another **Format as HTML** table in another task or step, use **Save Profile**.

To use an existing table format here, use **Select Profile** to load the relevant format.

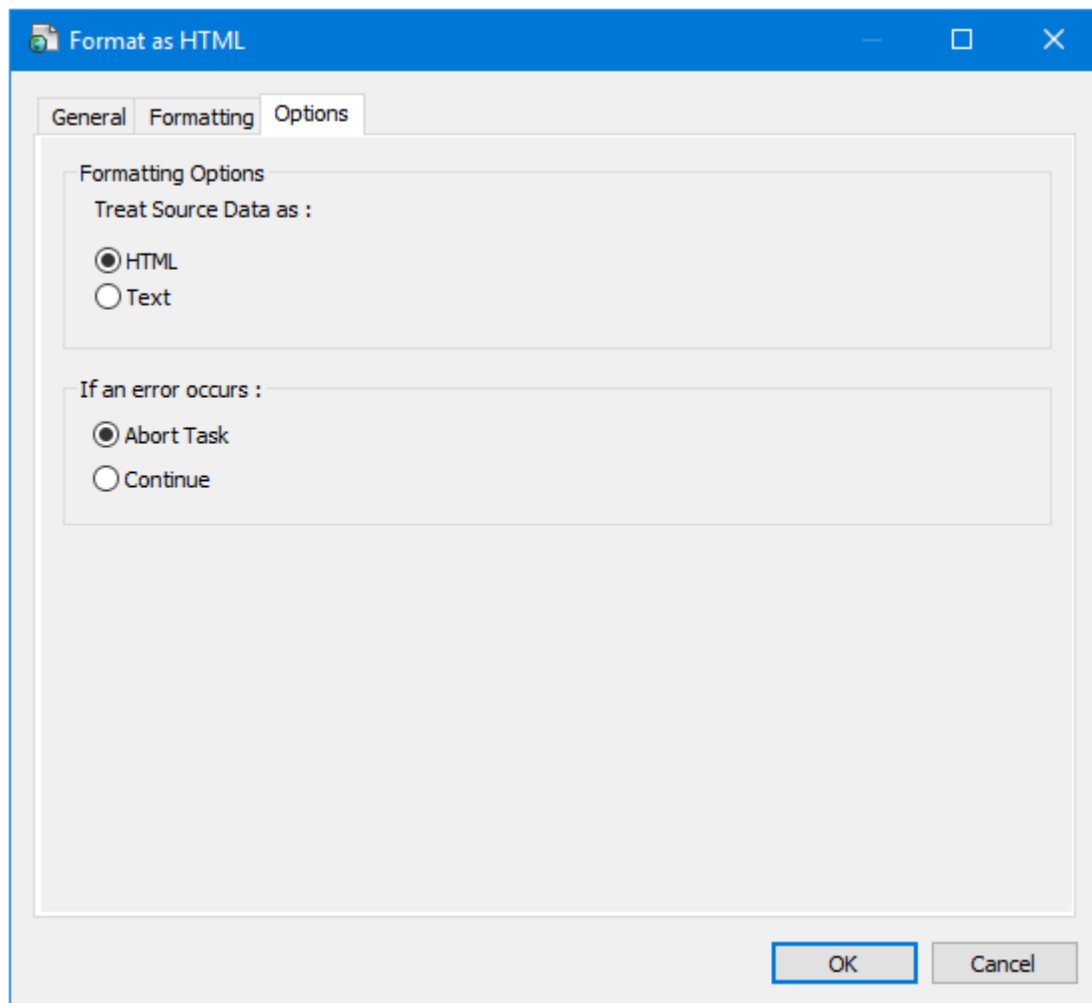
You can change the layout, border, background, and font of the following:

- ▶ **Table** — Properties specified here affect the whole table
- ▶ **Title** — Properties specified here affect the top table heading row
- ▶ **Sub Total** — Properties specified here affect the sub-total row if enabled (see [Sub Total](#))

- ▶ **Section Title** — Properties specified here affect section breaks if enabled (see [Section Break](#))
- ▶ **Grand Total** — Properties specified here affect the grand total row if enabled (see [Grand Total](#))

About the Options Tab

The **Options** tab allows you to define how errors in this step are handled at task runtime.



If the consuming recordset contains HTML data, you can choose how to **Treat Source Data**:

- ▶ **HTML** — If data in a recordset contains HTML tags, enabling this option processes such data as HTML and outputs accordingly. For example, `Name`, `Description` would be outputted as **Name**, *Description*.
- ▶ **Text** — All data in a recordset column, including any HTML tags, is processed as plain text and outputted as such. For example, `Name`, `Description` would be outputted exactly as is.

NOTE: The **Formatting Options** panel is just for HTML data found in the source recordset, not for processing any HTML tags typed into the **Formatting** tab's design area.

If an error occurs, you can decide whether the step should **Continue** processing, or terminate the step immediately (**Abort Task**).

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+44 (0) 330 99 88 700



enquiries@codelessplatforms.com



www.codelessplatforms.com

