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1 Reference

1.1 Dynamic Values

Dynamic Values are used to display non-fixed data on devices and reports. magic5 has a number of methods and places in which to do this but this list deals explicitly with the ones that can be used in:

- **Device Workflow** Template actions in the **Value to Set** prompt
- **Template Item Types**, particularly Drop-down lists and General output data in the Additional display info
- **Repeating Sections** within a Template for default values to be carried across
- **Quick-fill** buttons for tables and sections
- **Device Template action to Update customer flag**
- **Summary Form** Template action **Value to Set**

In these areas, Dynamic Values can be used along with text to create the information required. For example, the source form that feeds into a summary form might collect the height, width and depth of an item with unique name of productH, productW and productD respectively. It may be expedient to create a single value for output onto the summary form in the format:

`%@productH%(h)x%@productW%(w)x%@productD%(d)` which would output (for example)
`24(h)x14(w)x6(d)`

There are 4 types of Dynamic Value:

1. **Result value**, as shown above. This uses a previously entered value and is used in a number of areas, including **repeating sections** and **quick-fill** tables/sections.

Variations include:

- `%@[unique name]%` which uses the value of the item on the form specified by the unique name.
 - `%@[unique name]_Sequence_$\$current%` which uses the value of the unique name as entered in the current repeating section
 - `%@[unique name]_Sequence_$\$first%` which uses the value of the unique name in the first of a set of repeating sections
 - `%@[unique name]_Sequence_$\$last%` which uses the value of the unique name in the last of a set of repeating sections
 - `%@[unique name]_Sequence_$\$penultimate%` which uses the value of the unique name in the last-but-one of a set of repeating sections
 - `%@[unique name]:att%` which uses the value of the specified attribute of the specified unique name
2. **Header** information, which uses form values such as customer, location and device user in the format `$$$[header name]%` where [header name] can be:
 - GUID: result GUID of the current form
 - CUSTOMER current customer name
 - LOCATION current location name
 - LOC current location name
 - ADDRESS current location address
 - CUSTOMERADDRESS current customer address
 - DATE date of form as YYYY-MM-DD
 - TIMESTAMP current date/time as YYYY-MM-DDTHH:MM:SS
 - WORKTIME time of form as HHMM

- TIME current time as HHMM
 - USER current username
3. **Context-specific** information, that uses the value of an item in a *specific context*, such as customer attribute or the output id when using device workflow actions.
- %![tag name]% The exclamation mark (!) prefix outputs a **value**, often free text or numerical, and is used when the value itself is meaningful.
 - %+[tag name]% The plus sign (+) prefix outputs a **description** and assumes that the tag name is an id. This is used with list item attributes where a description is more meaningful than the id.

The following areas use Context-specific Dynamic Values:

- **Additional display information (Drop-down List items and related items types)**

Each additional attribute associated with the drop-down list item will be available as a context-specific tag. The attributes available will depend on which "additional attributes" have been specified for the list in question. In addition, description will be a tag giving access to the list item description.

- **Additional display information (General Output Data for Customers, Locations and Users)**

Each additional attribute associated with the customer, location or user will be available as a context-specific tag. In addition, description will be a tag giving access to the customer or location name or, in the case of users, the user's username.

- **Device Workflow - multi-forms**

In this case a new form is created for *either* every row in the source table *or* each cascading child item in a selected list entry.

sourceId contains *either* the **value** of the column specified as the source table (using the syntax [unique name of table]:[unique name of column]), *or* the **id** of the cascading child item specified in the same box (as a unique name) - in this case %+sourceId% would probably be used to output the description rather than id.

4. **General tags**, which behave similarly to Header information but are interpreted differently by magic5 to insert the fixed items listed below.

The syntax is %[tag name]%

- CUSTOMER customer name
- LOCATION location name
- USERFULLNAME current username
- DATE form date as YYYY-MM-DDTHH:MM:SS
- SHORT_DATE form date as YYYY-MM-DD
- YEAR form date as YY
- MONTH form date as MM
- GUID form GUID
- CURRENT_DATE current date as YYYY-MM-DDTHH:MM:SS
- CURRENT_SHORT_DATE current date as YYYY-MM-DD
- CURRENT_YEAR current year as YYYY
- CURRENT_MONTH current month as YYYY-MM
- APP_VERSION version of the app (eg 6.116.615.2)
- YY form year as YY
- MM form month as MM
- DD form date as DD

- CURRENT_YY current year as YY
 - CURRENT_MM current month as MM
 - CURRENT_DD current date as DD
 - NEW_LINE new line character to allow a new line of text to be started (ie 'carriage return')
 - DEFAULT_EMAIL_FROM_ADDRESS default used by magic5 when setting up a new e-mail
 - DEFAULT_EMAIL_TO_ADDRESS default used by magic5 when setting up a new e-mail
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1.2 System Lists

magic5 uses specifically named lists for certain activities. These are:

- **Location Groups** - contains customised groups for linking users with locations that are independent of the main group. For example, this restricts a customer to see only reports for their company and region, or prevents a member of staff being inundated with reports that are outside their jurisdiction.
- **E-mail templates** - can be created using HTML markup language or free text and added into this list. Once in this list they can be attached to an action in the job definition or template. For further information go to **Create e-mail templates (on-line documentation)**
- **Standard documents** - documents uploaded to this list can be attached to email. For further information go to **Standard documents (on-line documentation)**.
- **ExcelTemplates** - contains a list of templates available for parameters such as **Report tab (on-line documentation)** tab
- **Word templates** - contains a list of templates available for parameters such as **Report tab (on-line documentation)**
- **Spreadsheet formats (Jobs)** - contains a list of spreadsheet formats that can be used to import jobs. For further information go to **Import a job sheet (on-line documentation)**

1.3 Output Document formats

magic5 uses a number of output formats, as listed below. Some are standard, and are shipped with magic5 while others can be created/customised by an administrator. The more complicated formats may need bespoke work to get them exactly right - please contact magic5 to find out more.

- **Standard PDF formats.** **Any template** created on the system can be output as a PDF using one of the standard formats. Options include front sheet/no front sheet and logo + contact details. All changes in the template are reflected in the PDF. This is the most basic option - it works for all forms but is a bit unsophisticated.
- **Programmed PDF format.** This is for a **particular template** and is created and formatted specifically to cope with a particular form. It is usually required to replicate the standard layout required for a **regulation document**. This is usually a bespoke option.
- **Programmed PDF layout.** This will also work for **any template**, but applies customised rules to layout and formatting. For example, company branding may dictate that everything should be in landscape with Times New Roman fonts and text in bold, red italics. This is usually a bespoke option.
- **Excel mail merge.** This uses a **skeleton spreadsheet** that can have form data merged into it and would, typically, use a separate skeleton for **each form**. This is a powerful option which handles simple, repetitive data very well but is not sophisticated enough for complicated forms. This is usually a bespoke option.
- **Word mail merge.** This uses a **skeleton document** that can have form data merged into it and would, typically, use a separate skeleton for **each form**. This is emerging as a preferred method as it allows an administrator to create and update content appropriate to their individual, and changing, circumstances. It is also able to handle very large documents.

Fixed items (such as regulation text, reference to legal publications, contact personnel) can easily be kept up-to-date using Word without involving magic5 support.

Variable items (as shown below) can also be modified in-house, but this is an advanced task and it is advised to take copies of all documents before starting. magic5 support will offer assistance if required. These items include:

- **Mail merge fields:** a simple example of saying “put the data from item xxx here”
- **Bookmarks:** for more complex cases. These are tailored to individual circumstances but have covered areas such as Observations/Actions/Timescales, Photos, Annotations, Signatures, Action Plans.

Standard bookmarks are provided but magic5 can provide bespoke work for other items.

For further information see **Create a Word report (from magic5 output) (on-line documentation)** and [Create a Word report \(from scratch\)](#)

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