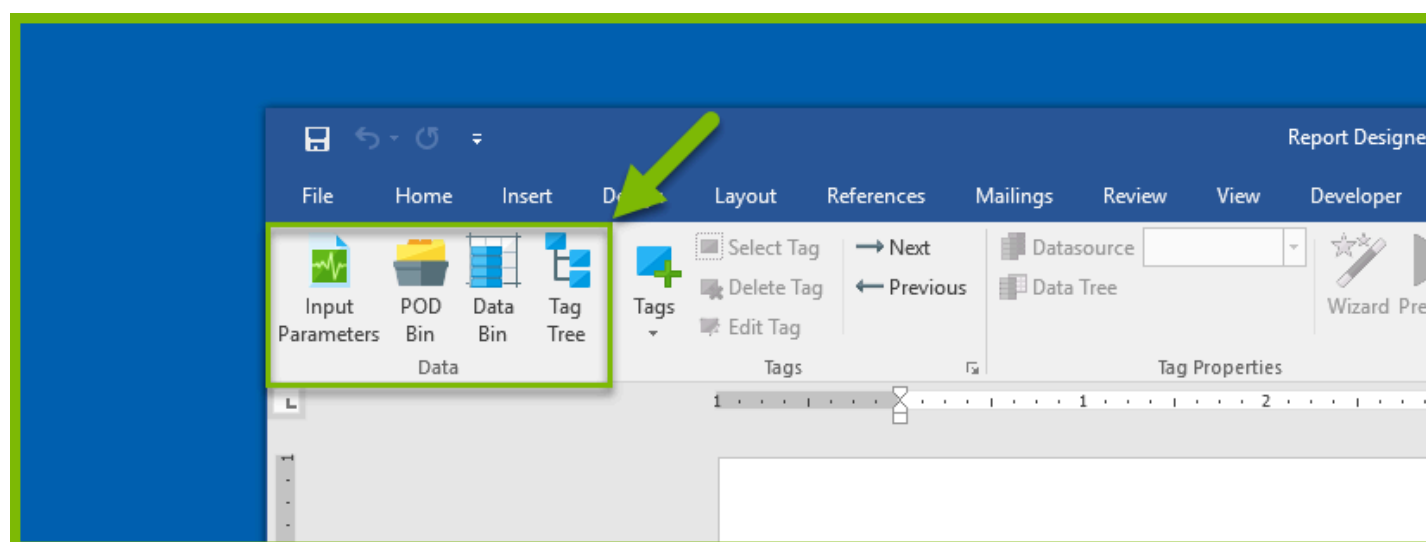# Report Designer Office Edition User Interface (Ribbon) Reference

The Report Designer Office Edition interface consists of two tabs in the Word, Excel or PowerPoint ribbon: the *AutoTag* and *AutoTag Manager* tabs. This article describes the various buttons, icons, menus and links on those tabs.
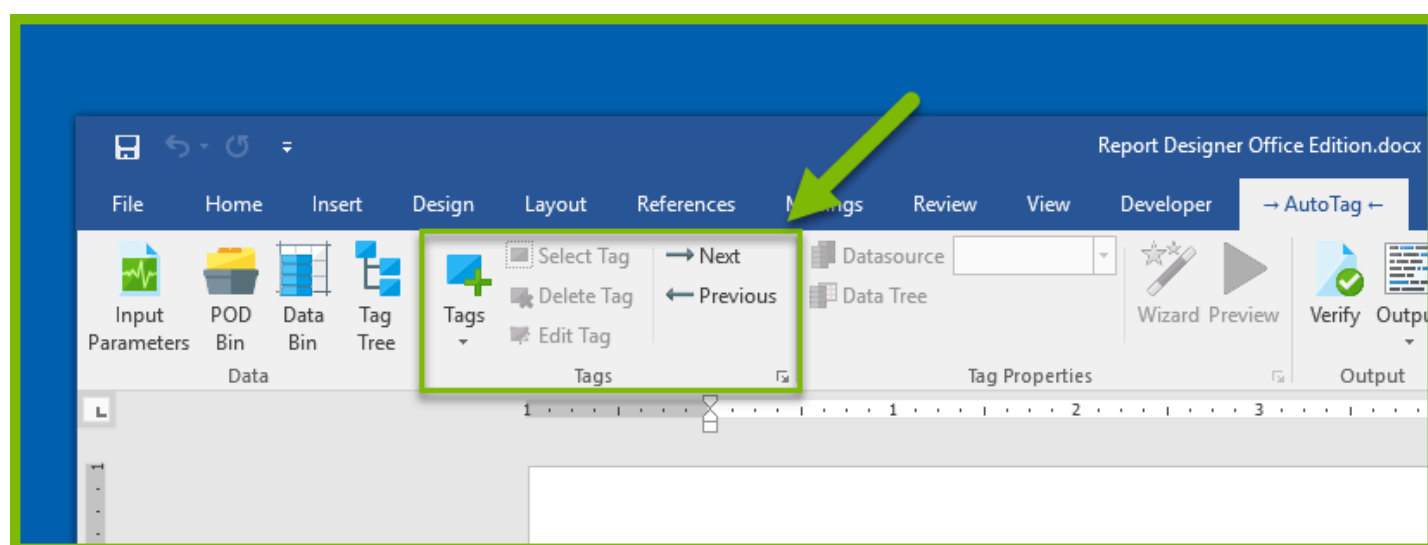
AutoTag Tab Sections

Data

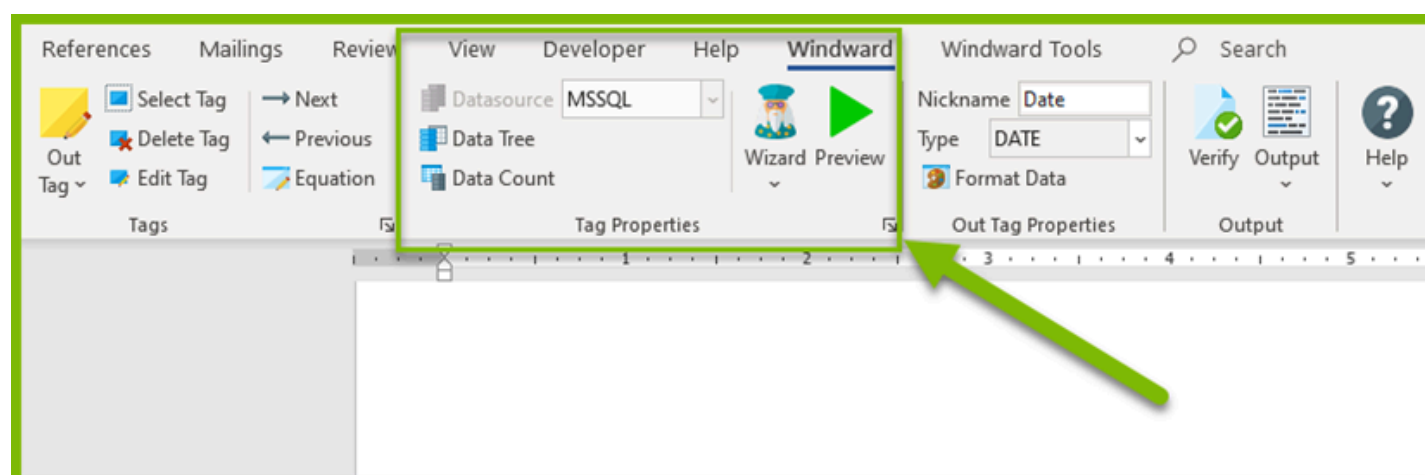| Interface Item	Description
Input Parameters	Create a variable inside of AutoTag and build a dropdown box or select field with a list of values. When users run the report, they will either enter a value in the select box or choose one from a dropdown list.
POD Bin	PODs contain predefined groups of tags that you can drag and drop into report templates. (These groups are defined, saved, and added to the Bin by you or your organization.)
Data Bin	The Data Bin contains all the data that is

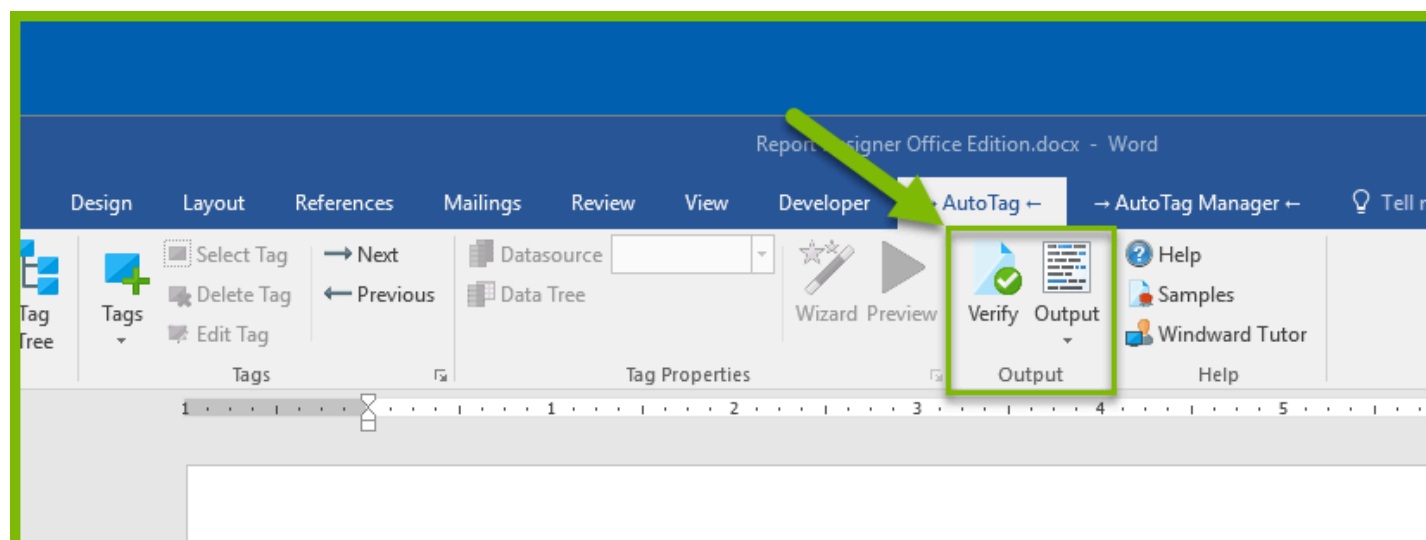| Interface Item	Description
	accessible from a data source. You can create Tags by dragging and dropping items from the Data Bin onto your template.
Tag Tree	The Tag Tree provides a graphical view of the structure of your template.

Tags

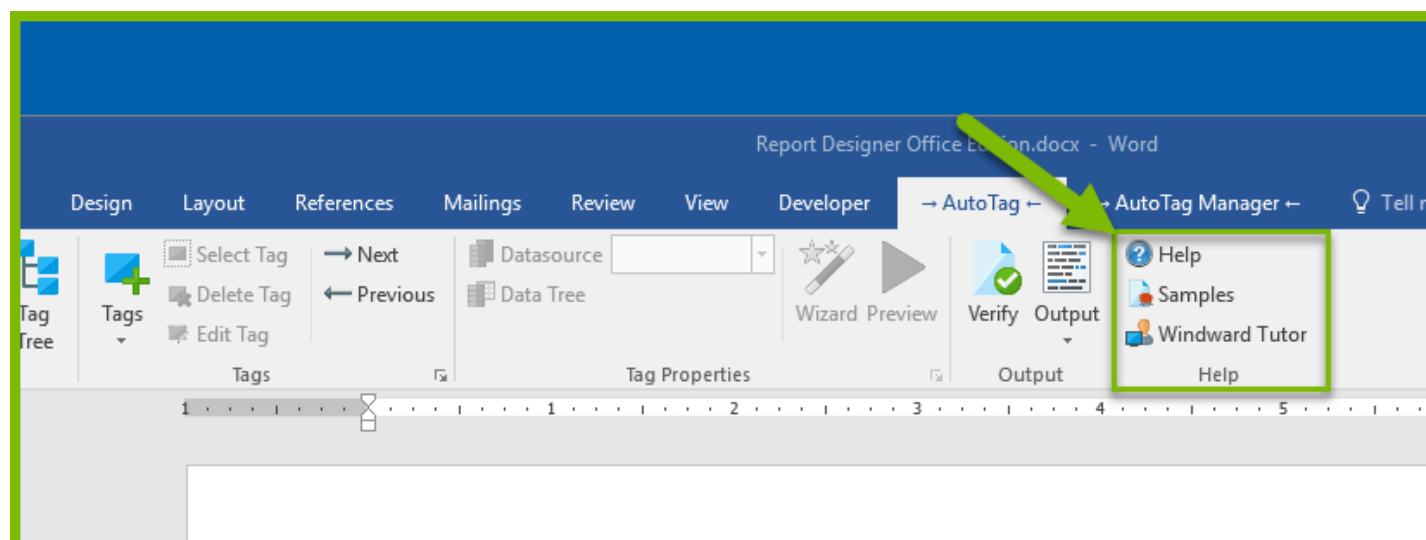| Interface Item	Description
Tags	Click this button to insert one of Report Designer's 16 tags.
Select Tag	This selects the Tag on which you have your cursor. It is especially useful when working with Text Tags. It's best practice to delete a Tag by using this button to select the Tag, then use the Delete Tag button to delete it.
Delete Tag	Use this button to delete a selected Tag.
Edit Tag	Clicking this button brings up the Tag Editor.
Next, Previous	Use these buttons to quickly jump from Tag to Tag in a template.

Tag Properties

Interface Item	Description
Datasource	This drop-down menu allows you to assign a data source to the selected Tag. There will be a menu item for each data source defined in the template.
Data Tree	This button presents a graphical view of the data in your data source. It's a short cut to the Tag Editor Data Tree Pane. Use it to assign data to the selected Tag.
Data Count	Evaluate all ForEach tag selects and count the number of rows of data that will be processed when the report is run.
Wizard	This button brings up the SQL, XPath or JsonPath Wizard for the selected Tag, depending on the type of data source connected to the Tag. Beginning in 16.1, it also brings up the Condition Wizard for the selected Tag.
Preview	Selecting a Tag and clicking this button will produce a popup window displaying the data the Tag will retrieve when output is generated from the template.

Output

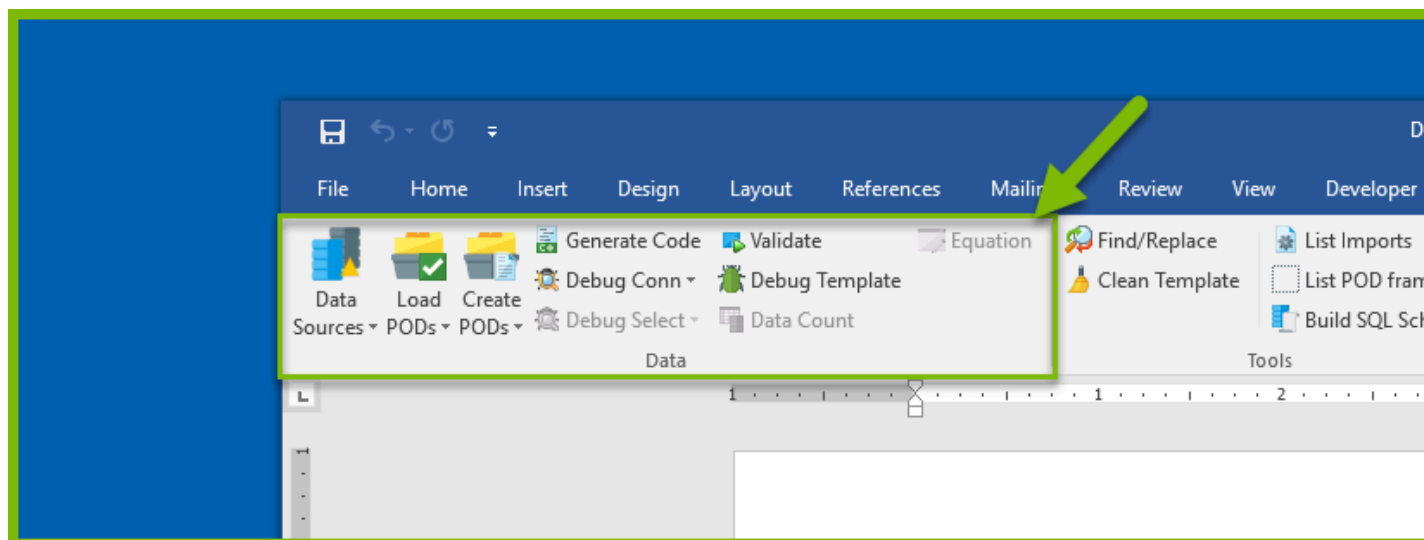| Interface Item	Description
Verify	This button executes the Tags in the template with special error checking, and displays potential problems (without generating output).
Output	When your report is Tagged and ready to generate output against your live data, click Output and select the type of document you wish to create.

Help

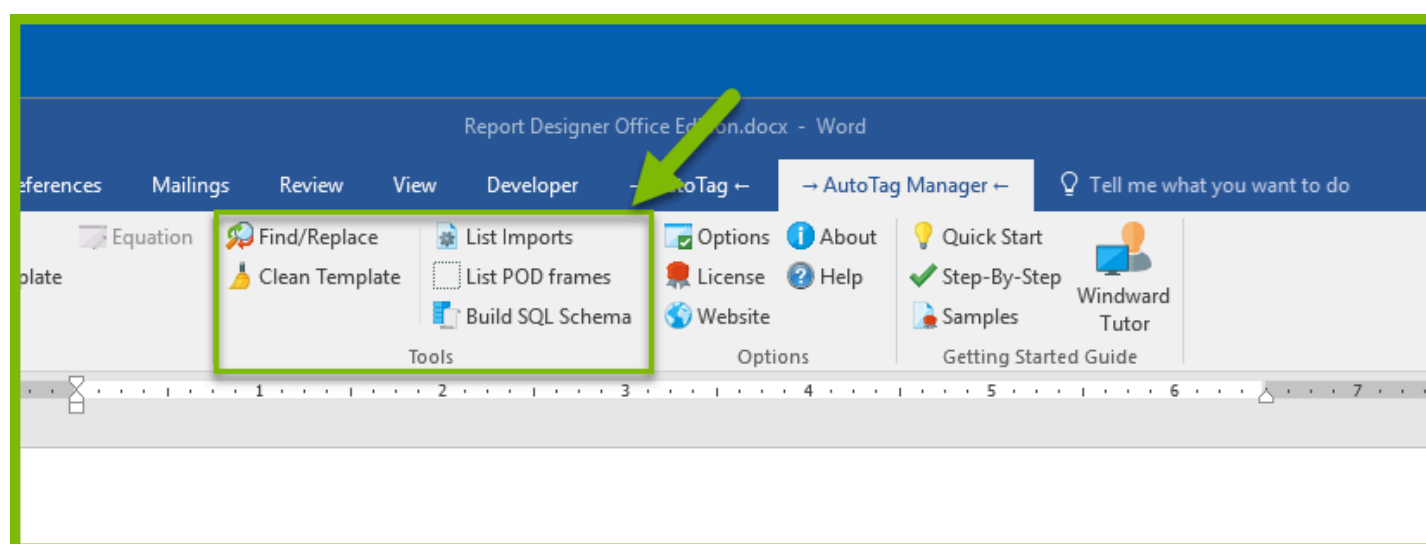| Interface Item	Description
Help	Clicking on this button opens a browser tab with articles in our online Knowledge Base.
Samples	This button opens the Sample Templates of our in-product Getting Started Guide.
Windward Tutor	This button opens our online Report Designer Tutorial.

AutoTag Manager Tab Sections

Data

> ℹ️ *PODS* are Portable Object Doclets: snippets of Microsoft Word objects that can be used in other templates.

Interface Item	Description
Data Sources	Click this button to bring up the Connection Editor (to add a new data source or manage your data sources), or click the small arrow to choose a recently used data source for a new template.
Load PODs	This button lets you load groups of Tags (PODs) that can be used in another template, or in Javelin.
Create PODs	Use this button to create or edit groups of Tags that can be used in other templates, or in Javelin.
Generate Code	Generate sample source code reflecting the template's configuration for use with the Report Engine APIs.

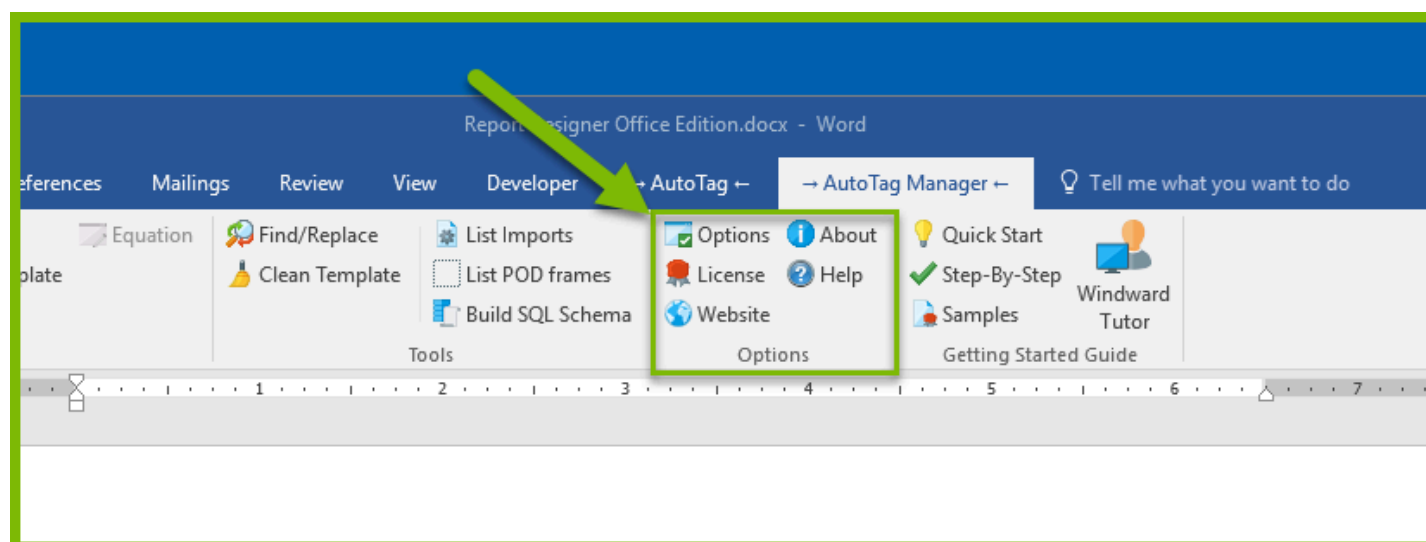| Interface Item	Description
Debug Connection	Use this drop-down menu to select a SQL, XML or OData connection debugger.
Debug Select	This drop-down menu lets you select a SQL or XML query debugger.
Validate	This button starts a validation process, to check your Tags and display warnings and errors if it finds problems (without generating output).
Debug Template	The Template Debugger can help you determine why your template is not generating the output you expect.
Data Count	Click on this button to see how many rows or nodes are returned by all of the Tags in the template.
Equation	Insert a Windward function into a Tag to further manipulate your data. When in Excel, most native functions can also be used in Tags.

Tools

Find/Replace	This tool allows you find and replace text in

|	Tags throughout a template.
Clean Template	This tool "scrubs" the template: it closes your existing template; opens the new scrubbed template; deletes the old template; and renames the new template with the name of the original template.
List Imports	Lists all subtemplates imported into a master template's output via Import Tags, including subtemplates imported inside imported subtemplates.
List POD Frames	Click on this button to scan the template and list all Pod frames listing their type, GUID and page/line number in the template.
Build SQL Schema	Use this tool to build a SQL Schema file that can be used to trim unneeded DB objects from huge SQL data sources.

Options

Interface Item	Description
Options	This button opens the Report Designer Options window, where options global to a template can be set such as logging, the template's locale, whether Tags are inserted

Interface Item	Description
	as Text Tags or Field Tags, etc.
License	View or update your license key.
Website	This is a link to the Windward Studios website.
About	Click on this button to see general information about your Report Designer installation, such as the version number and when your license key expires.
Help	This is a link to our online Knowledge Base with several useful articles.

Getting Started Guide
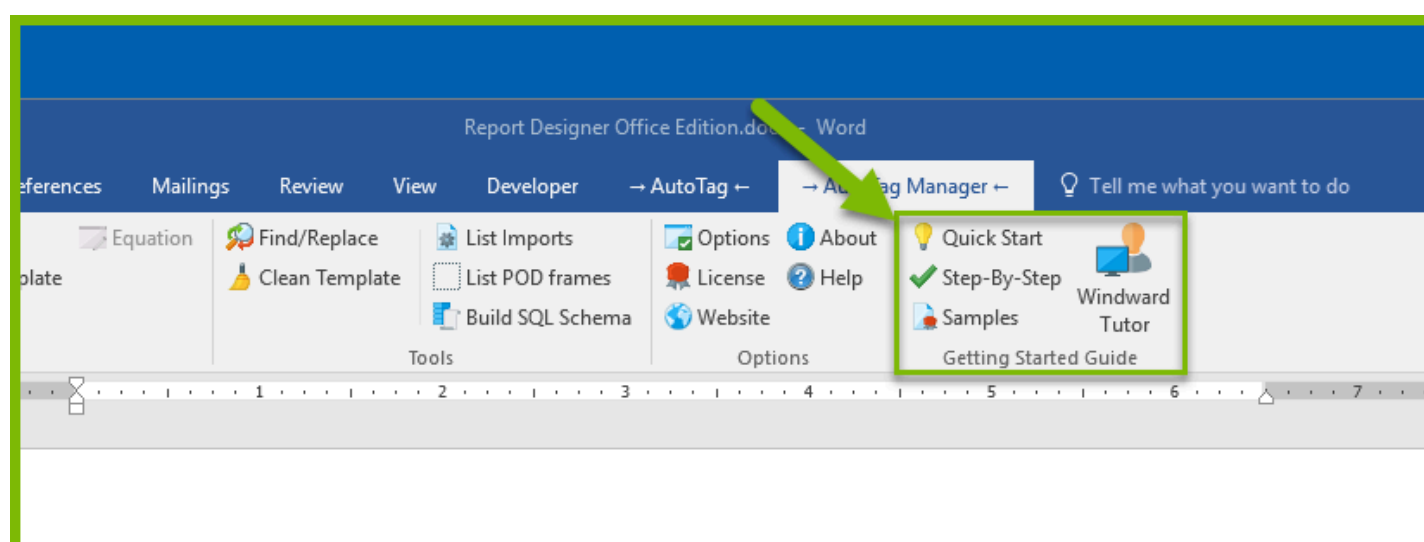
Interface Item	Description
Quick Start	Click on this button to bring up the in-product Getting Started Guide.
Step-by-Step	This button opens the Step-By-Step panel, which shows you how to create your first template and output.
Samples	This button brings up the in-product Getting Started Guide with its Sample Templates section open.

Interface Item	Description
Windward Tutor	This is a link to our online Report Designer tutorial.