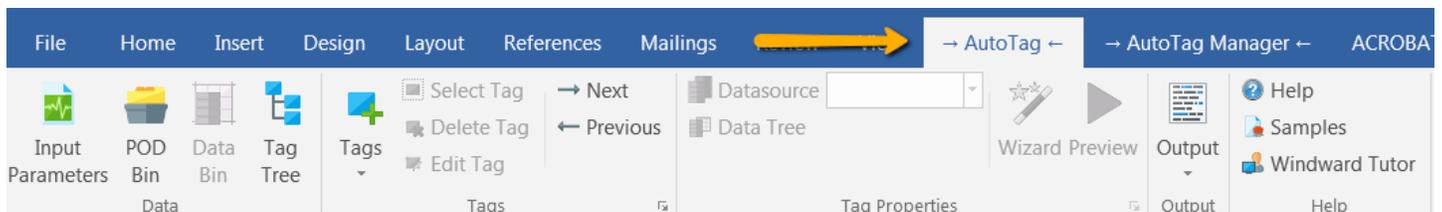**WIND WARD**

The AutoTag Interface, Version 15

Welcome to AutoTag! This quick reference sheet introduces you to the AutoTag interface and provides you a look at the two tabs, AutoTag and AutoTag Manager, that are added to Microsoft Office when you install AutoTag v15. This guide is designed to get you up and running with AutoTag quickly, and we invite you to bookmark or print this sheet and refer to it as you get to know the software.
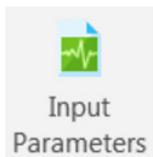
***

The AutoTag Tab

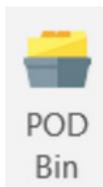*The AutoTag Tab, as it appears in Office 2016.*

Data Menu

Input Parameters

Create a variable inside of AutoTag and build a drop-down 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 drop-down list.
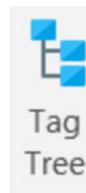
POD Bin

PODs contain pre-defined 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.
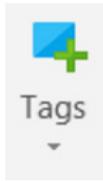
Data Bin

The Data Bin contains all the data that is accessible from a particular report template. You can drag and drop items from the Data Bin into your template.

Tag Tree

The tag tree provides a quick look at the tag structure of your template.

Tags Menu

Insert Tags

Click this button to insert a Windward tag, which is a placeholder in your template that is replaced with data when you run your report.

Select Tag

This selects the tag you have your cursor on. It is especially useful when working with text tags.

Delete Tag

When you place your cursor on a tag and click this icon, the tag is deleted.

Edit Tag

Clicking this will bring up the Tag Editor, which allows you to edit a tag in your template.

Next, Previous

Use these icons to quickly jump from tag to tag in a template.

Tag Properties Menu

Selected Data Source

This field shows the data source assigned to the tag you have selected.

Data Tree

Click to bring up a dropdown menu showing connected data sources. Use this tool to assign data to a tag.
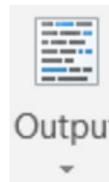
Select Statement Wizard

The wizard walks you step-by-step through selecting a subset of data to use in a report. When using this tool, you are creating a select statement.

Preview

Clicking this button when you have selected a tag will generate a popup displaying the data that the tag will retrieve upon Output.

Output

When your report is tagged and ready to be run with your live data, click Output and select the type of document you wish to create.

Help Menu

Help

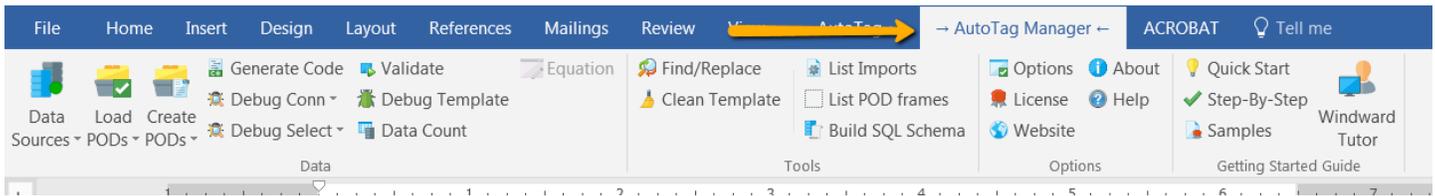The Windward Reports Help file.

Samples

This icon directs you to the Windward Sample templates -- they are a great way to learn the basics and to add other tricks to your templates.
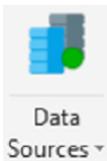
Windward Tutor

Windward Tutor hosts great tutorials for beginning AutoTag users.

The AutoTag Manager Tab

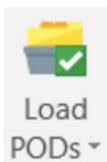*The AutoTag Manager Tab, as it appears in Office 2016.*
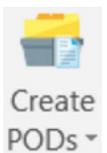
Data Menu

Data Sources Manager

Click the button to bring up the Connection Editor (to add or manage a data source), or click the small arrow to choose a recently used data source for a new template.
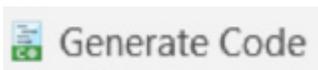
Load PODs*

This icon lets you load groups of tags (PODs) that can be used in another template or in the Javelin Portal.

Create PODs*

This icon allows you to create or edit groups of tags that can be used in other templates or in the Javelin Reporting Portal.

Generate Code

Use this feature to view and use the code behind the template.

Debug Connection

This tool allows you to debug a connection to a Data Source.

Debug Select

This tool allows you to debug the Select Statement of a selected Tag.

Validate

Use this tool to validate your data.

Debug Template

The template debugger can help you determine why your template is not generating the report you expect.

Data Count

When the ForEach tag is used, this tool will count the number of rows of data that will be processed when the report is Output.

Equation

Insert a function into a Word template to further manipulate your data. When in Excel, most native functions can be used.

*Portable Object Doclets: Doclets are snippets of Microsoft Word objects, and these are portable, meaning that they can be moved and used in other templates.

Tools Menu

Find Replace

This tool lets you find and replace text in tags throughout a document.

Clean Template

Scrubs the file, closes the existing template, deletes the old file, and renames the new file the name of the original file.

List Imports

Lists all files placed in a final report via the import tag, including imports inside imported templates.
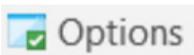
List POD Frames

Scans the template and lists out all Pod frames listing their type, GUID and page/line number in the template.

Build SQL Schema

You can use this program to create a schema file (by pointing it at a database) or create one by hand.

Options Menu

Options

AutoTag's options control how tags are read and how they display in a template.

License

Update and view your license key via this icon.

Website

Link to Windward's website.

About

Basic info about AutoTag, such as version number and license expiration date.
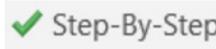
Help

The Windward Help file.

Getting Started Guide Menu

Quick Start Guide

Get started with AutoTag.

Step-by-Step

A walk-through on how to use AutoTag.

Samples

This icon directs you to the Windward sample templates -- a great way to learn the basics of how Windward tags work.

Windward Tutor

Great tutorials for new AutoTag users.

Get Personalized Help With AutoTag and the Engine

Attend a live training session of Windward's products!