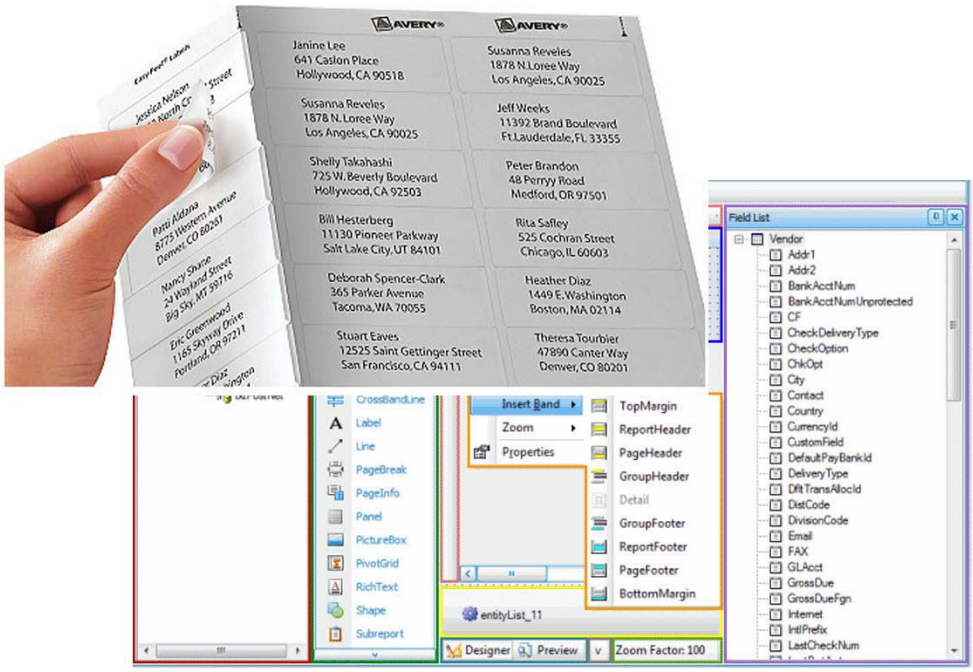
TRAVERSE®

Label Setup Tutorial

A Tutorial for Setting up Labels

Knowledge Base Article



OPEN SYSTEMS INC.

This document describes the intended features and technology for TRAVERSE 11 as of November, 2016. Features and technology are subject to change and there is no guarantee that any particular feature or technology described in this presentation will be present in this or subsequent versions of TRAVERSE.

November 2016

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Introduction

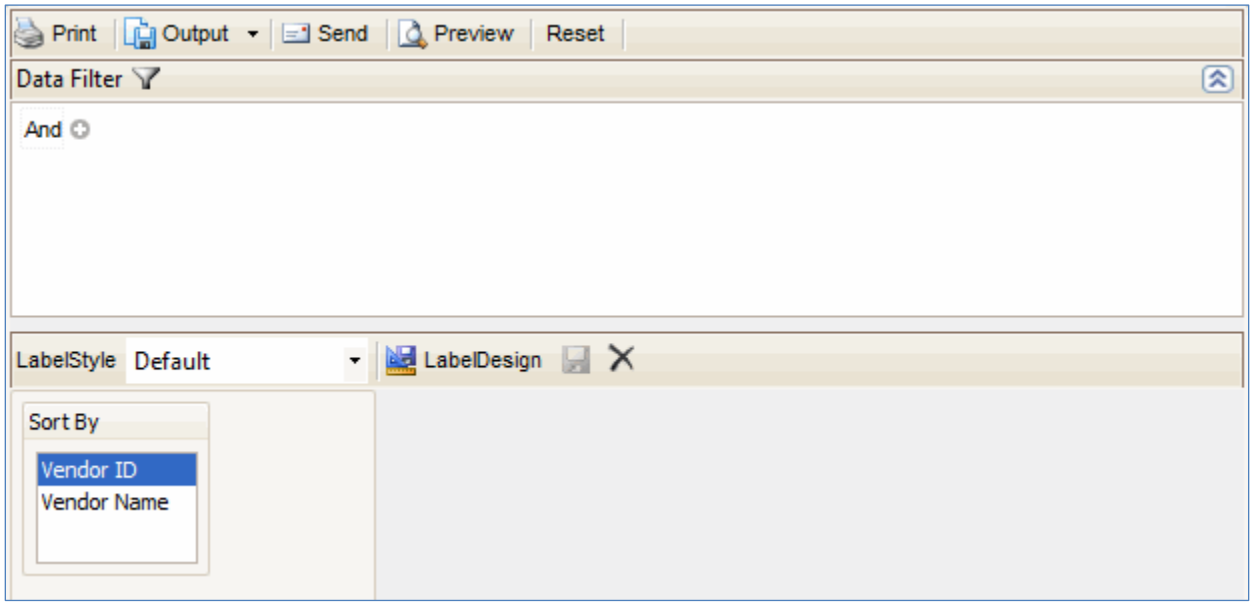
On the Master Lists menu in Accounts Payable, Accounts Receivable, Payroll, Purchase Order, and Warehouse Management, you can print labels that include data from TRAVERSE. If needed, you can also customize the information on these mailing labels.

A POSTNET barcode, which is an extension of the 9-digit zip code used by the United States Postal Service, is printed on your labels if you chose that option using the Country Codes function of the System Manager.

The Command Buttons on the menu bar allow you to **Print** the labels, **Send** the labels in PDF format as an email attachment, and **Preview** the labels. You can use the **Reset** button to clear your filter.

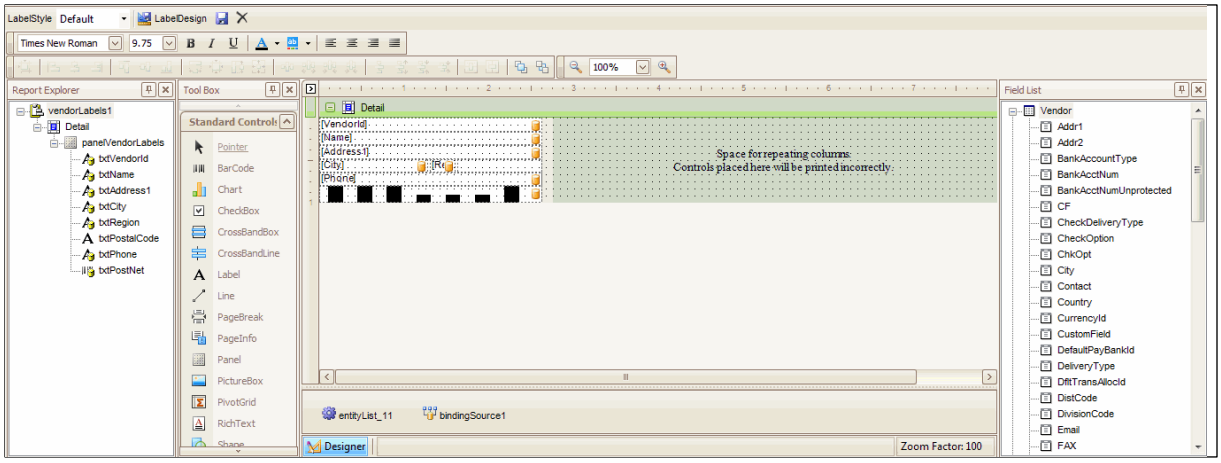
Data Filter and Sort By

Sample Data Filter



- Use the **Data Filter** to select a subset of vendors, customers, ship-to addresses, etc., rather than printing labels for every record in TRAVERSE.
- Each Labels function also allows you to select how to sort the list. The Sort By options differ depending on the list you are using.
- Select the **LabelStyle** you want to use. The Default label style is provided for you. By default, the labels are sized and positioned for printing on 8.5” x 11” (Letter) sheets of 1” x 2.625” (30 labels per sheet) address labels.
- Click the **LabelDesign** button to open the design screen for the label.

Label Designer



You can use the Label Designer to modify the labels. Each section allows you to customize a different aspect of the label.

Formatting Toolbar

Use the Formatting Toolbar to change the appearance and justification of the text on your label. The buttons function the same as the formatting toolbar in most word processing programs.

Layout Toolbar

Use the Layout Toolbar to align the fields on your label.

To Grid: Align the selected component to the grid.

Component Alignment: Align the selected components with each other as specified.
Align Lefts/Align Middles (vertically)/Align Rights
Align Tops/Align Middles (horizontally)/Align Bottoms

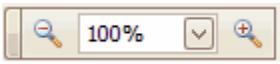
Component Size: Resize the selected components to each other as specified.
Width/Size to Grid/Height/Same Size

Component Horizontal Spacing: Space the selected components with each other as specified.
Make Equal/Increase/Decrease/Remove

Center: Position selected component centered in the active area (band).
Horizontally/Vertically

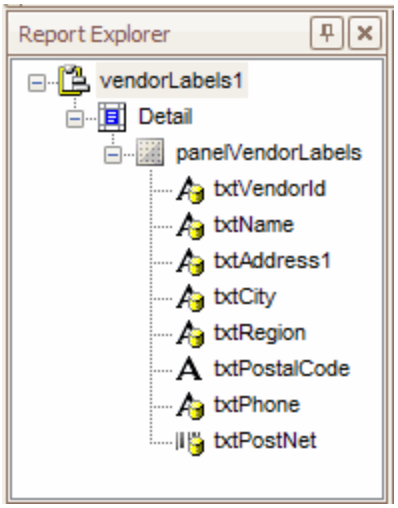
Bring to Front/Send to Back: Layer the selected component(s) in relation to other components.

Zoom Toolbar



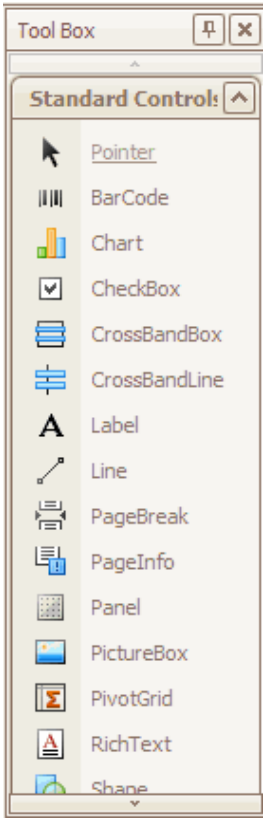
Use the Zoom Toolbar to adjust the size of the label work area on your screen.

Report Explorer



The Report Explorer displays the components available on the label. This panel is display-only; you cannot make any changes on this panel. If you click on an entry in the Report Explorer, the corresponding portion of the Form Layout Screen will be selected.

Tool Box



Each item on your label is a component, or control. For example, the text fields and the barcode are controls.

The Tool Box holds the controls you can add to your label. Not all controls can be added to a label.

To add a control to your label, click and drag the control from the Tool Box onto the label, then drop the control.

Right-clicking on the control once it is on the label opens the context menu for the control.

From the context menu, you can open the Property Grid for the selected control. This allows you to see the various settings for the control. You can find more detail later in this document.

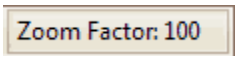
Component Tray

The display-only Component Tray shows the data-binding components for the label. These components provide connections to the TRAVERSE database from the label.

View Tabs

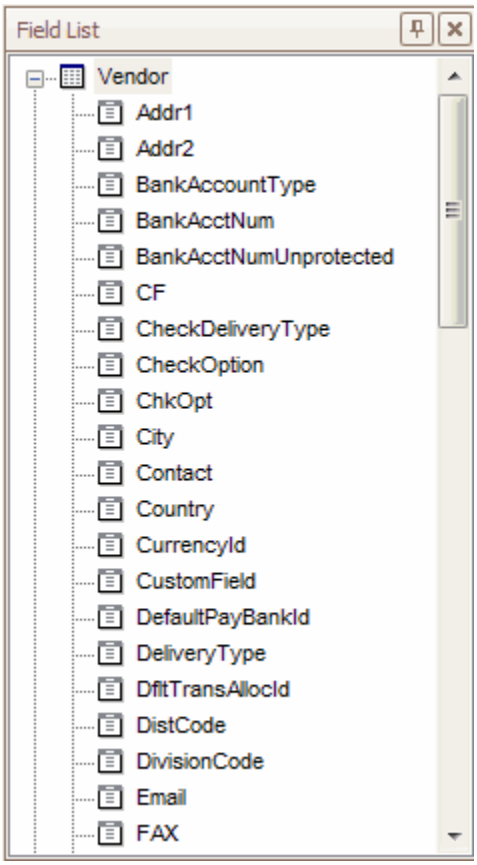
The View Tabs display the name of the currently selected component or control. Some selections also display one or more properties of the control.

Zoom Panel



The Zoom Panel displays the current zoom level.

Field List

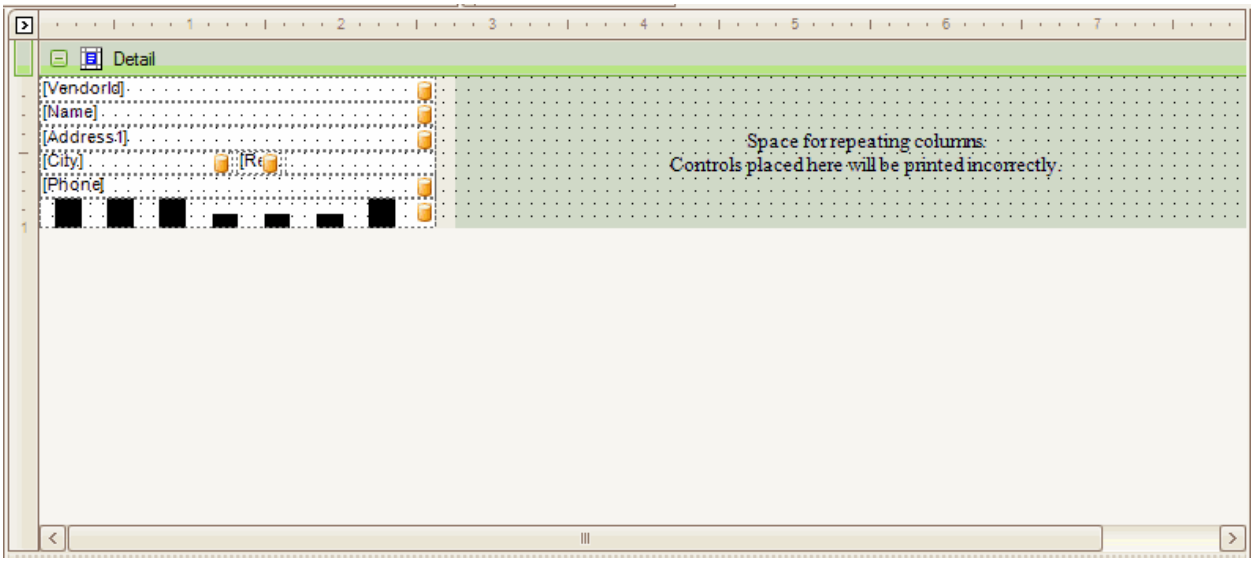


The Field List shows the table(s) and fields available as sources of the values in the text boxes, barcodes, etc. which appear on the label.

The entityList component (in the Component Tray) binds the database to the fields on the label.

For more information on adding or editing fields on the label, see later in this document.

Form Layout Screen

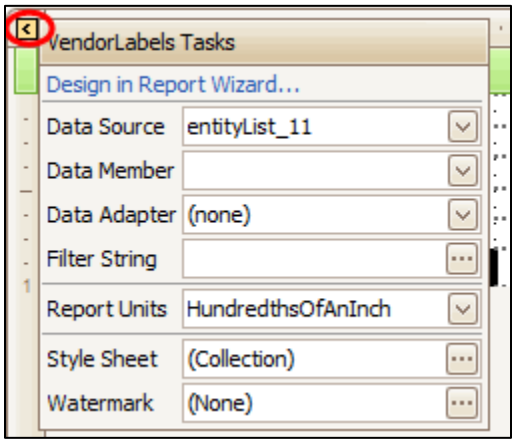


The Form Layout Screen is the design area of the Label Designer. You can see the layout and value of each field on the label. The rulers show the size of the label area (white). The database icon ( ) indicates the field is a data-bound field. You can resize or drag the fields into different positions.

Areas of the Form Layout Screen

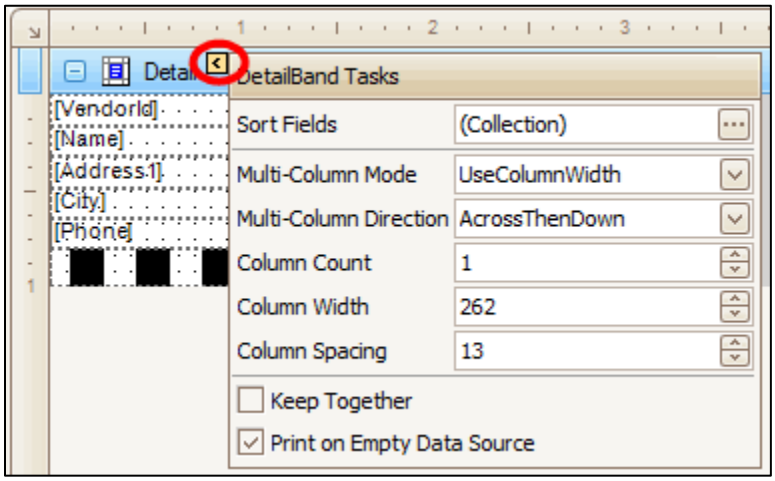
Form Detail:

Additional information about the form (label). Click on the arrow button in the upper left corner of the Form Layout Screen to view more details including data binding details, units of measure for the report, and whether the report includes a watermark. Do not change this information, as that will affect the data the labels contain.



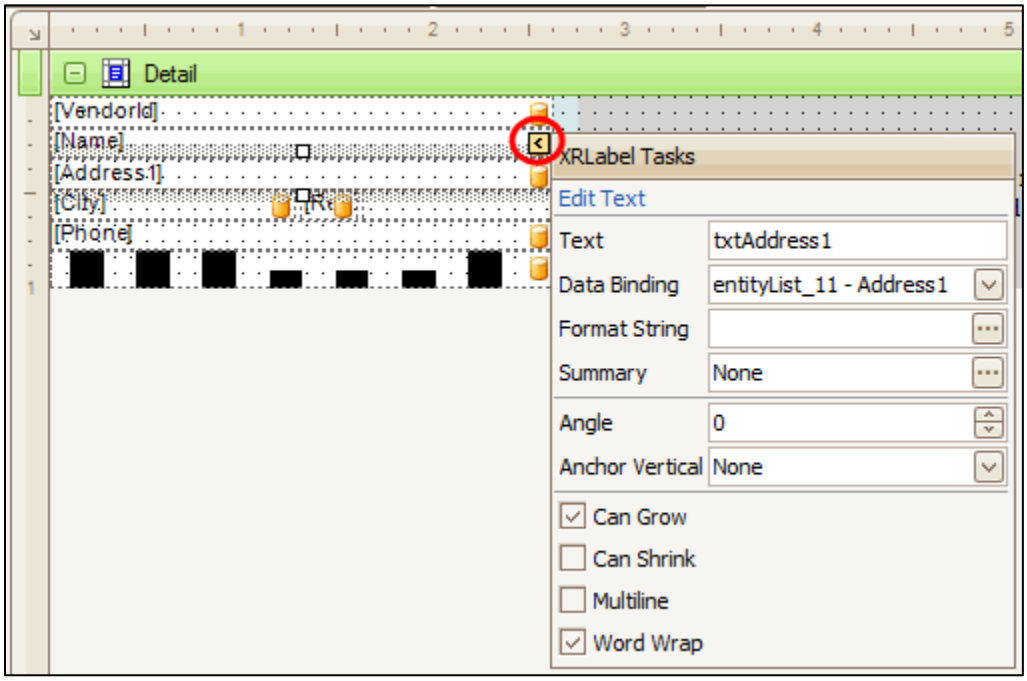
Detail Band:

Main activity area. When the Detail bar is selected, you can view more information about the detail band by clicking the arrow button. Do not change this information, as that will affect how the labels print.



Data Fields:

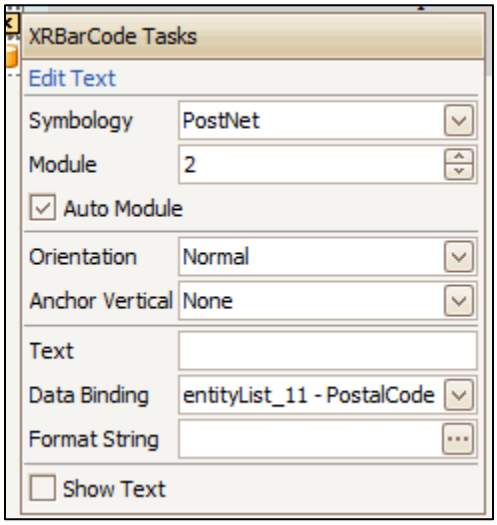
The textboxes, barcodes, etc. that are tied to the databases are considered data fields. If you select a data field and click on the arrow, you can see additional information about that field.



- Text – the name of the field if the field is a data-bound field, or the static text that appears in the field if the field is not bound to a database field.
- Data Binding – the name of the database field the textbox is bound to.

- Format String – for such information as currency amounts, quantities, or dates, this determines how that value is displayed.
- Summary – if the field displays a running total or sum of other data, you can set how the value is calculated.
- Angle – the direction of the field. An angle of 0 means the field is horizontal with no slope.
- Anchor Vertical – You can set a vertical anchor which will keep the field in position when the window is resized.
- Field Options – You can control if and how the field adjusts to the length of the data it displays. Be aware, however, that the data may be cut off or overwrite adjacent data if the field value is sufficiently large.

In the case of a PostNet or other barcode field, the additional information includes barcode-specific information.



Symbology refers to the type of code displayed. Options include EAN128, Code 39, and various UPC code varieties.

Module is the width of the narrow bar in the code. The wide bars are multiples of the narrow bar width.

Orientation determines which direction the barcode prints in.

Data Binding selects the field which provides data for the barcode.

Show Text determines whether the text of the value encoded into the barcode is visible or not.

Creating a New Label

You may want to create labels in a different format or with different information than the default label supplied with TRAVERSE, such as a shipping label larger than the standard address label. You can do so through the Label Designer.

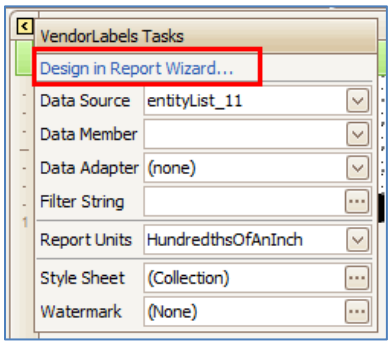
The Field List—the data available to include on the label—cannot be edited. If a value you want is not available in the field list, you cannot include it on the label.

The labels are considered a type of report by the Label Designer. To design a new label, you are basically designing a new report. Keep in mind there will be options available that are more applicable to a true report than labels.

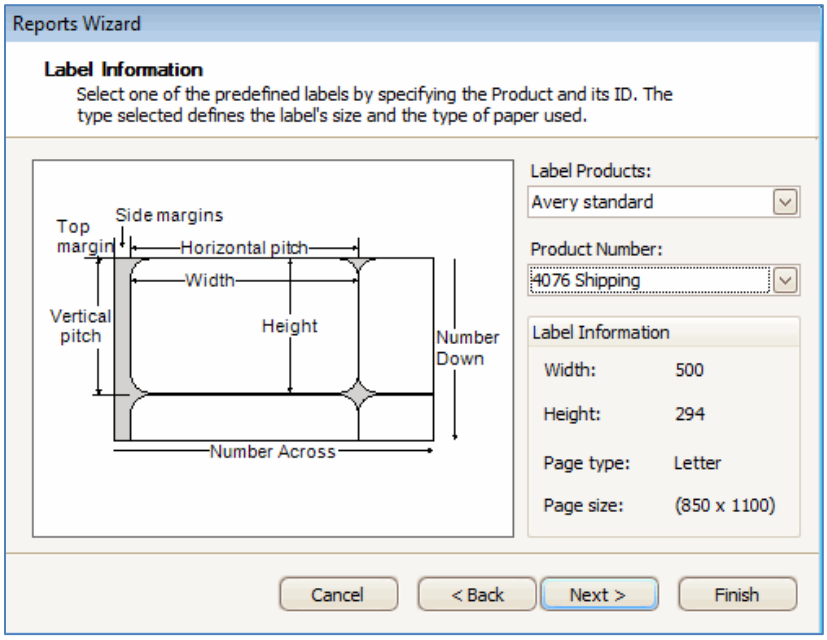
Report Wizard

The Report Wizard is the starting point for new label design.

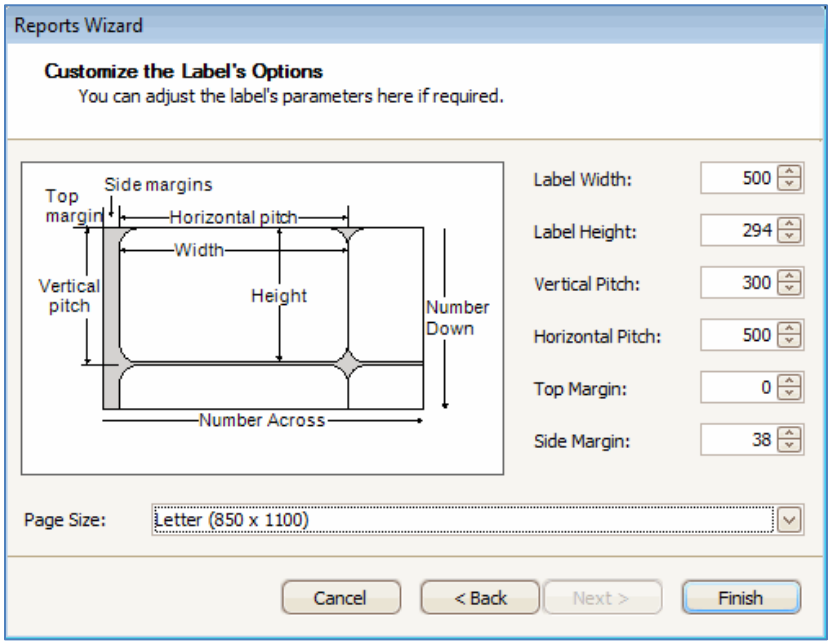
You can access the Report Wizard by clicking on the arrow button in the upper left corner of the Form Layout Screen. Click on the **Design in Report Wizard…** link



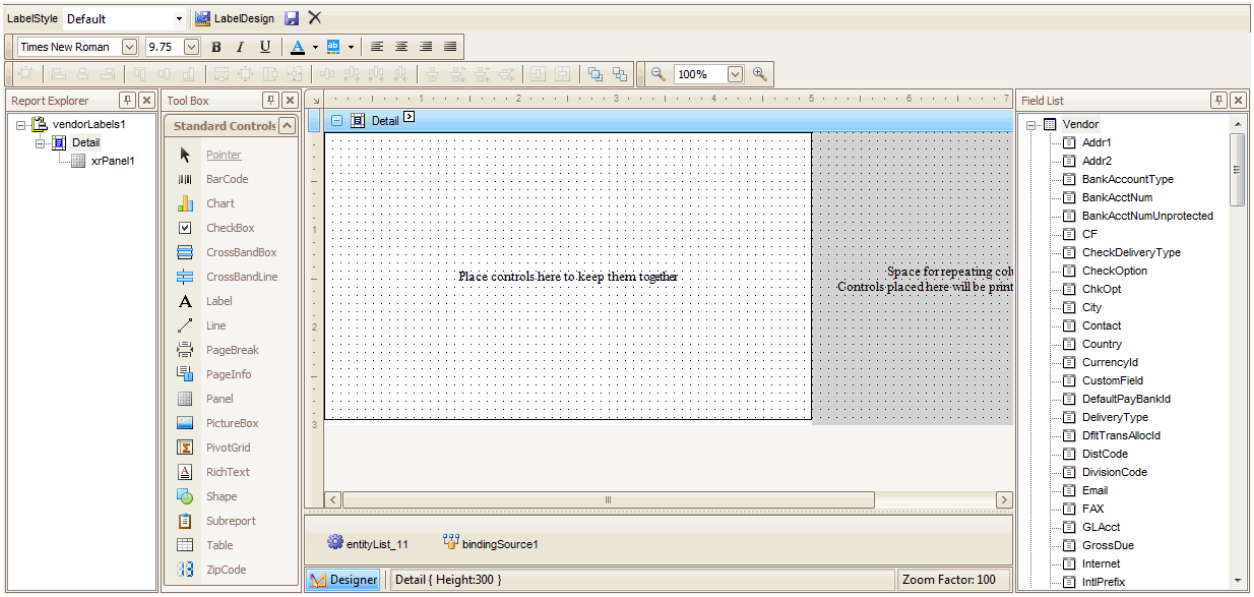
Choose a standard label size for your new label. First, select a brand of **Label Products**. Then select the **Product Number** of the label you want to use. The dimensions and page size of the label appear in the Label Information section.



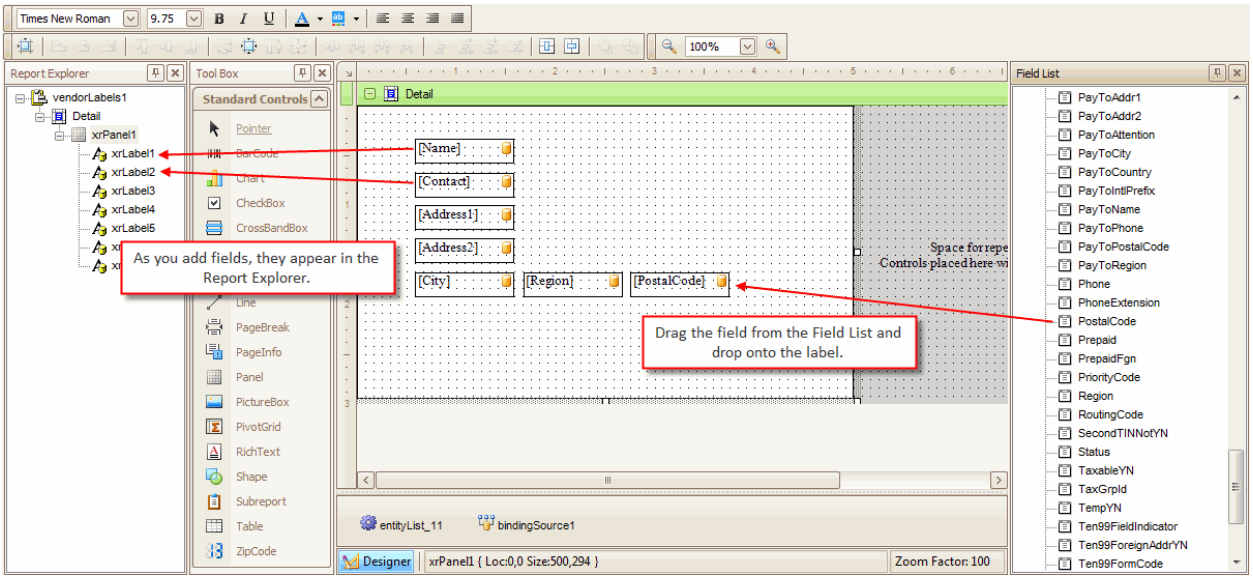
The next screen allows you to adjust the various measurements of the labels, margins, and spacing, if necessary.



The Label Designer will now show a blank label. Notice the Report Explorer has only the main form (xrPanel1) listed in its tree.

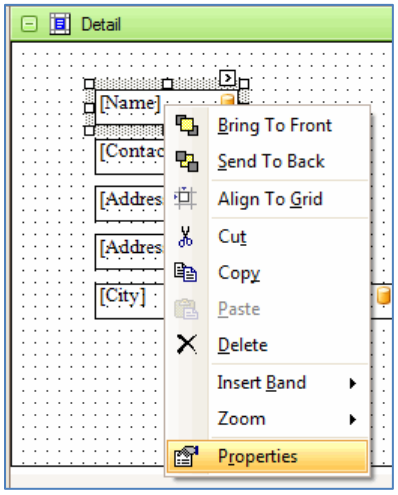


To add values from the database, such as vendor **Name**, vendor **Address**, etc., click and drag the fields from the Field List and drop them onto the label. Scroll in the Field List to see more values.

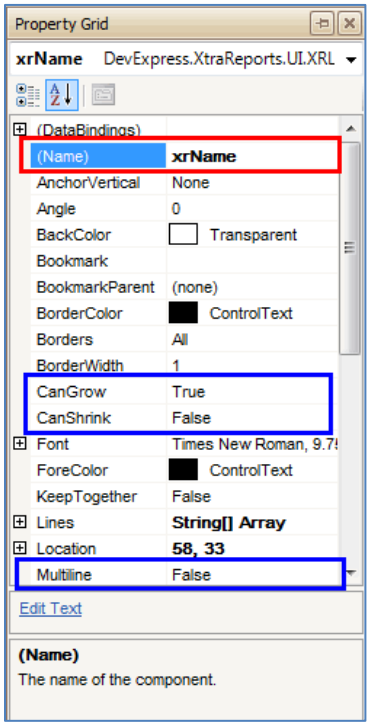


Once you have the fields on the label, change the default names of the fields to something more meaningful.

Select a field. Right-click and select **Properties** in the menu.



The Property Grid opens. Change the **Name** for the field. Once you change the name, that name will appear in the Report Explorer.



Other properties to note:

CanGrow: Allows the text field to expand horizontally when the length of the value exceeds the size of the field.

CanShrink: Allows the text field to shrink when the length of the value is smaller than the size of the field.

Multiline: Allows the text field to expand vertically when the length of the value exceeds the size of the field.

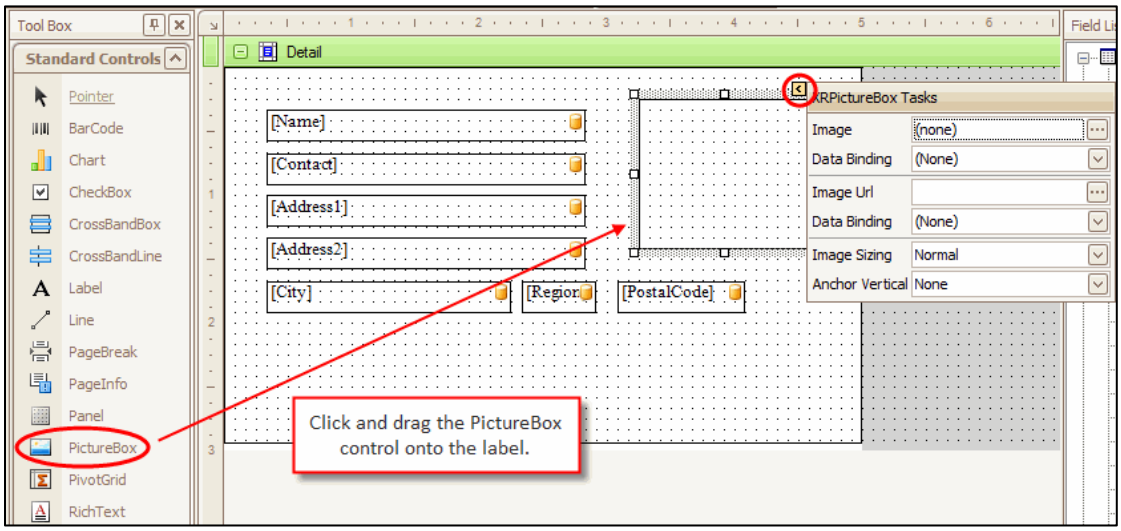
The Edit Text link at the bottom of the panel will put the cursor into the selected field to allow you to manually change its contents.

Resize and position the fields as necessary.

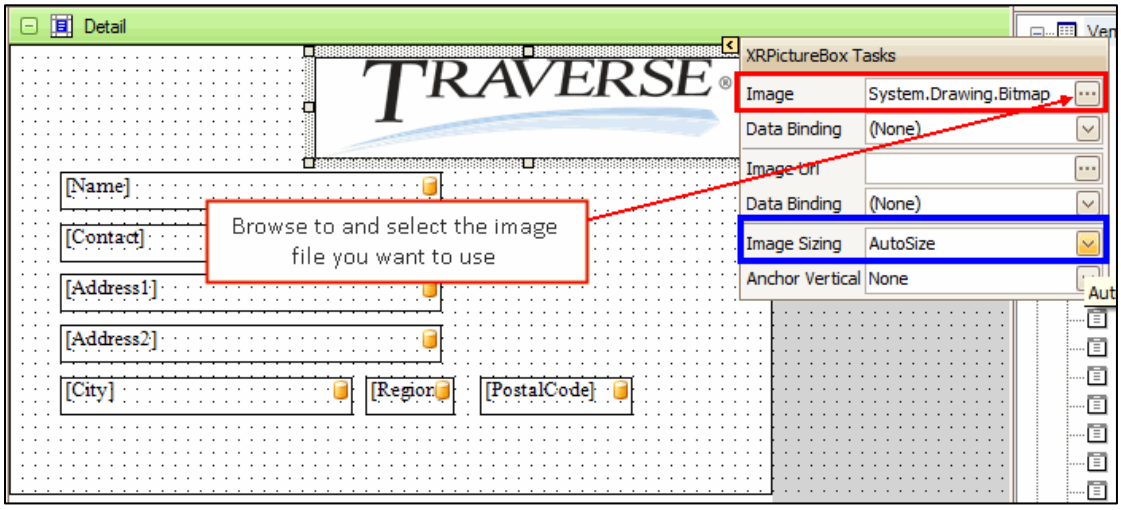
Add a logo to the label:

To add a logo, you need to add a PictureBox control to the label. Click and drag the PictureBox control from the Tool Box and drop it onto the label.

With the PictureBox control selected, click on the arrow button to view more information.



Use the **Browse** button (**…**) in the **Image** field to search for and select the image file you want to use.

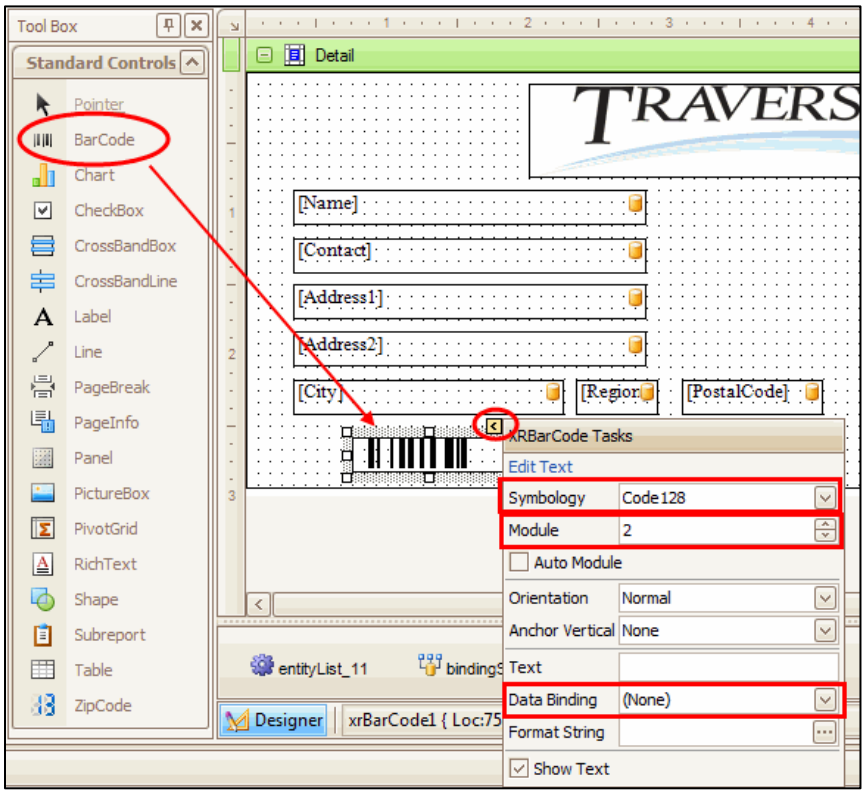


Once you have the logo file bound to the PictureBox control, select the appropriate setting from the **Image Sizing** drop-down field.

Add a barcode to the label:

To add a barcode, you need to add a BarCode control. Click and drag the BarCode control from the Tool Box and drop it onto the label.

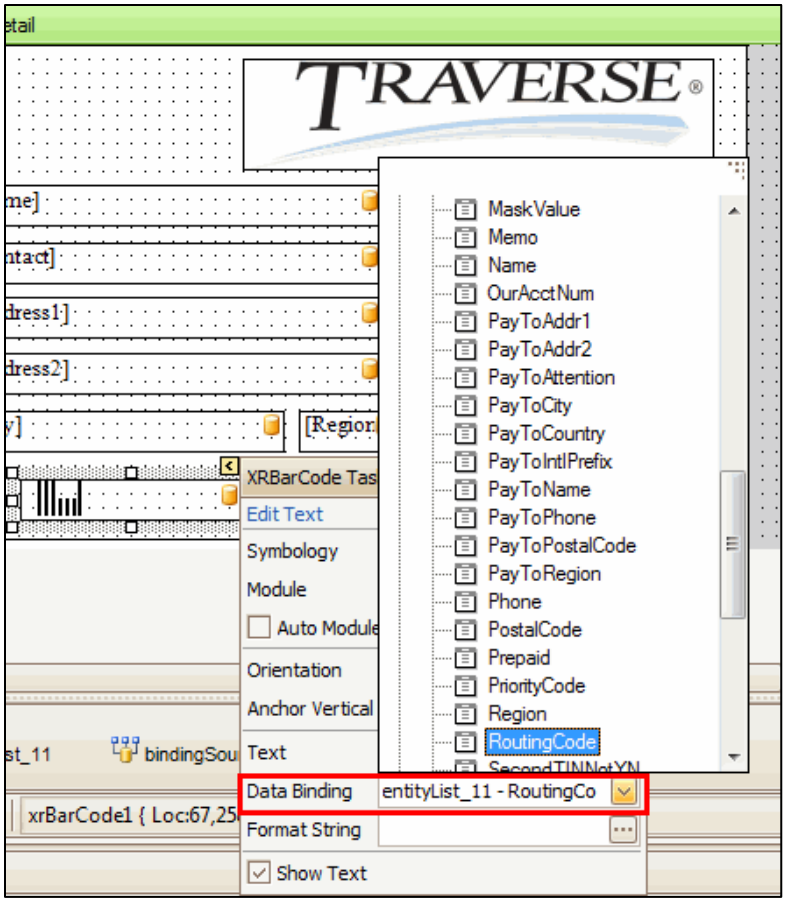
With the BarCode control selected, click the arrow button to view more information.



Select the barcode **Symbology** from the drop-down list.

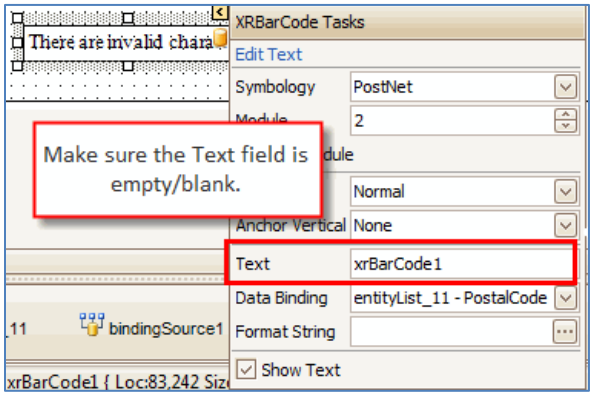
If necessary, select the **Module**, or mark the **Auto Module** check box. The module value determines the width of the narrow bars in the barcode, which will also determine the space the code will occupy on the label. The module value can also improve or degrade the readability/scanability of the code. Marking the **Auto Module** check box will cause the bars to widen or narrow depending on the size of the barcode control.

To tie the barcode to a value from the database, you will need to bind it to a field from the Field List. Select a field from the Field List by using the drop-down arrow in the **Data Binding** field.



Mark the **Show Text** check box if you want to display the text that is encoded in the barcode.

NOTE: If you get an error in the barcode control stating that there are invalid characters in the text, make sure the **Text** field in the additional information flyout is blank.



Change the font:

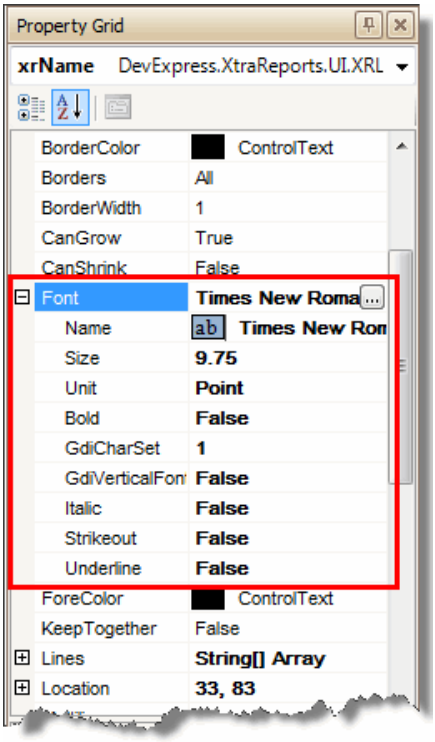
You can change the font on the label as you would in many other programs. Change the font name, size, color, or style in a couple different ways:

Method 1:

1. Select the control where you want to change the font.
2. Use the Formatting Toolbar to select a different font, change the font size, or edit the font style (bold, italics, underline, color)

Method 2:

1. Select the control where you want to change the font.
2. Right-click on the control and select **Properties** from the menu to open the Property Grid.
3. Expand the Font property in the Property Grid by clicking on the plus sign beside the Font property.



Change the values for the sub-properties as necessary:

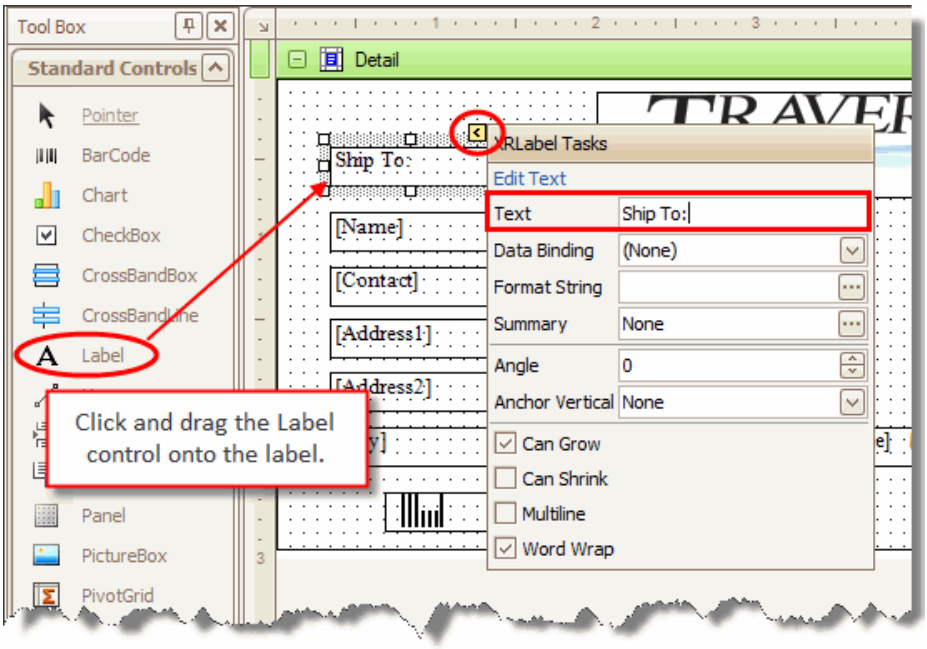
- Font Name
- Font Size
- Bold
- Italic
- Strikeout
- Underline

The ForeColor property controls the font color. To change the font color, select from the ForeColor drop-down list.

Add static text to label:

Static text is text that does not change, and is not bound to the database. For example, on a shipping label, the words “Ship To:” would be considered static text.

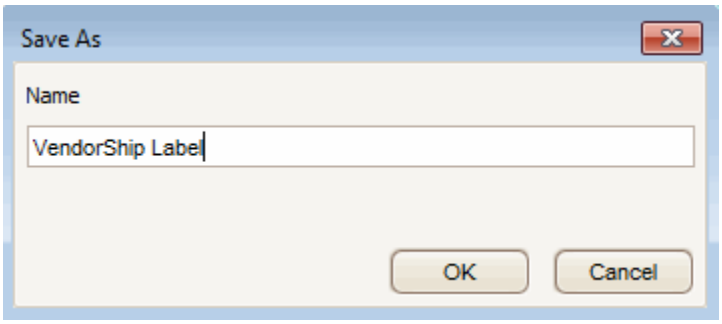
Use the Label control from the Tool Box for static text. Click and drag the Label control onto the label and drop it. Select the control and click the arrow button to show additional information. Enter the static text you want to display in the **Text** field.



Save the Label

Once you have created the label, save it with a descriptive name. For instance, in the example, we have been creating a shipping label in the AP application, so we can name the label: VendorShip Label.

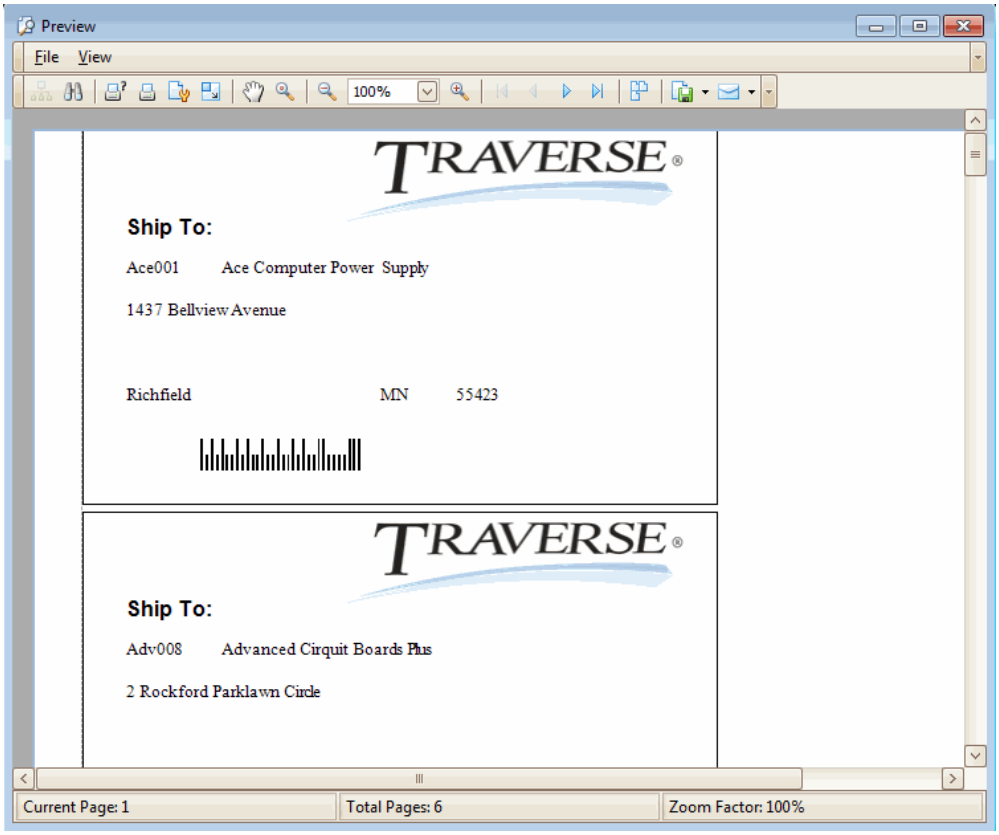
Click the **Save** button on the Label Designer. A Save As dialog box will appear. Enter a name for your label and click **OK**.



A notification window will appear once the label definition is saved.

Label Preview

Once you have created the label, you can preview it by using the **Print Preview** button (Preview). This will display a preview of the label sheet.

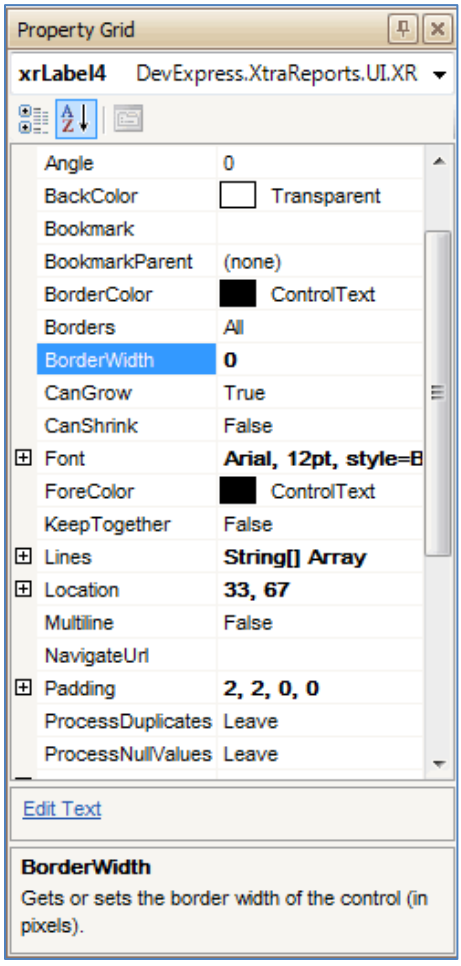


Tips

Property Grid

Use the property grid to set or change such characteristics as borders, highlighting (backcolor), sizing, font details, text alignment, and visibility for a control.

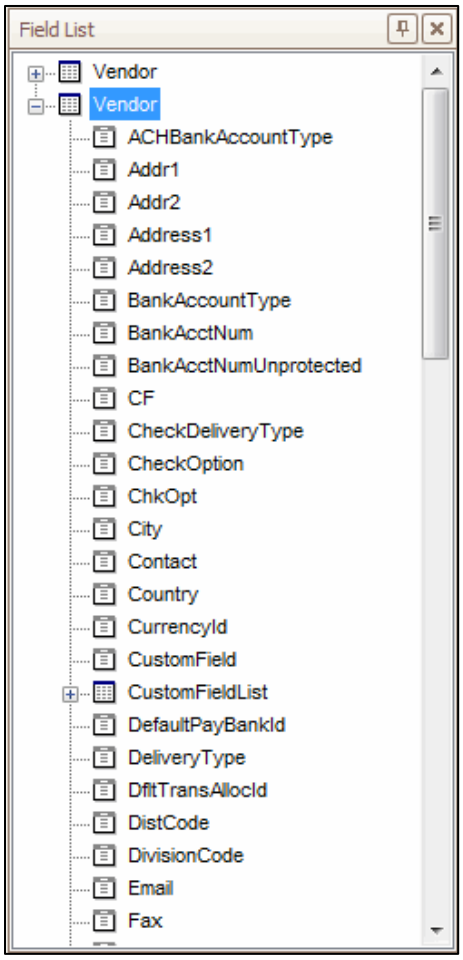
Open the property grid for the control by selecting the control, then right-clicking and selecting Properties from the menu.



- To turn the control borders off, set the **Border Width** to **0**.
- To highlight a control, select a **BackColor**.
- To change the font color, select a **ForeColor**.
- Expand the **Font** property to set the sub-properties such as font name, size, or style (Bold, Italics, Underline, etc).
- To adjust the margins within the control (such as with labels or text boxes), expand the **Padding** property and edit the margins.
- The bottom section of the Property Grid shows a brief description of the selected property.
- The property grid shows different properties depending on the control you select.

Field List

The Field List displays fields in select database tables. While you have no ability to change the table(s) or fields available in the list, you can bind the controls to different fields if the data appearing in the field is not correct.

If more than one table appears in the field list, click the plus sign to expand the fields for a table. Click the minus sign to collapse the list.

Use the arrow button on the selected control to open the control flyout and change the data binding for the control.