

# User manual

English



# Perception Word Organizer Version 2.0

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*For Perception 8.30 or higher*

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## 1 Introduction

Welcome to the **Word Organizer** software manual. This document describes how to use this software application. The purpose of the software is to automate the creation of multi-recording Word or PDF documents.

A special user interface is created to make the creation of a new Word or PDF document containing multiple subdocuments possible. The operator can assemble the new document by selecting existing Word documents. These actions will be described below in more detail.

Although the application acts as an integrated part of the Perception software it is not part of the standard Perception install. The application is a cost option of Perception.

The application is based on the Perception **Custom Software Interface (CSI)**.

This manual assumes you understand your Genesis HighSpeed Test and Measurement equipment, software and basic acquisition terminology. You may like to use the Perception User Manual as a reference.

## 2 Scope

This Perception software extension enables the use of Perception **Word Organizer** with any GEN DAQ hardware.

Via the extra sheet the operator can create new Word or PDF reports assembled from different subdocuments. These subdocuments are Word documents which are either created by Perception after for example a recording or they can be any other arbitrary Word document.

## 3 Getting Started

### 3.1 Installation

The Perception **Word Organizer** software is provided as an install file.

After running this install file the new software and manual should be installed on your PC. The Perception **Word Organizer** software is **not** a stand-alone program which can be started from the Windows Start menu! It is an integrated part of the Perception software program. Once you start Perception you will see an extra sheet called: **Word Organizer**

The manual has also been installed on your PC. It is a PDF file which can be opened via the windows start menu. If you cannot open this pdf file then you may have to install the Acrobat® Reader® which can be found on the installation CD. The manual is also available on the CD, you can read it before installing the software, to do this you just have to click **Word Organizer manual** (See previous shown installation screen).

Optionally you can install the demo files, these demo files can be used when reading this manual. This also can give you an idea about the way this can work.

### 3.2 Requirements

Perception **Word Organizer** software operates on any PC where Perception is running.

The Perception **Word Organizer** application can only be used when the HASP® USB key CSI option has been enabled. You can check it has been enabled by going to the Help About dialog and click **More...**

The "More About Perception" dialog shows which options are enabled.

The CSI option icon looks like:



The Perception **Word Organizer** software needs **Microsoft Word** to be installed. This **Word Organizer** software has been tested with the version Word 2007. It's presumed that all newer versions will work as well. We do not guarantee that versions previous to Word 2007 will work. You can only save as a PDF file after you install a free add-in for Microsoft Office 2007. This add-in utility enables you to convert a Word document to a PDF format. The install of this add-in can be found on the install CD. For newer versions of Microsoft Office this functionality is already part of the standard and therefore there is no need to install an additional add-in.

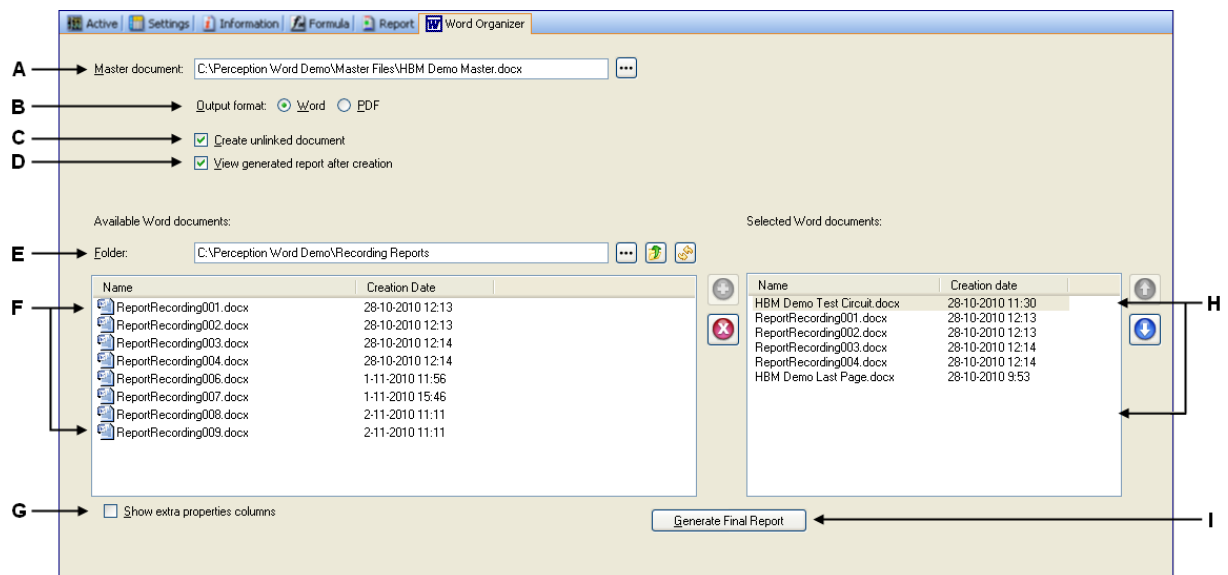
## 4 Application functionality

### 4.1 General

Perception has been extended with one extra sheet. This sheet is an integrated part of the Perception application. The sheet is called **Word Organizer**, it will be used to create new Word reports assembled from different subdocuments. These subdocuments are also Word documents which are either created by Perception after for example a recording or they can be any other arbitrary Word document. We assume that you know how to create Word reports with Perception by using the automation features. If this is not the case than you should read the chapter **Setting up Word reporting in Perception** at the end of this manual.

### 4.2 About the Word Organizer Sheet

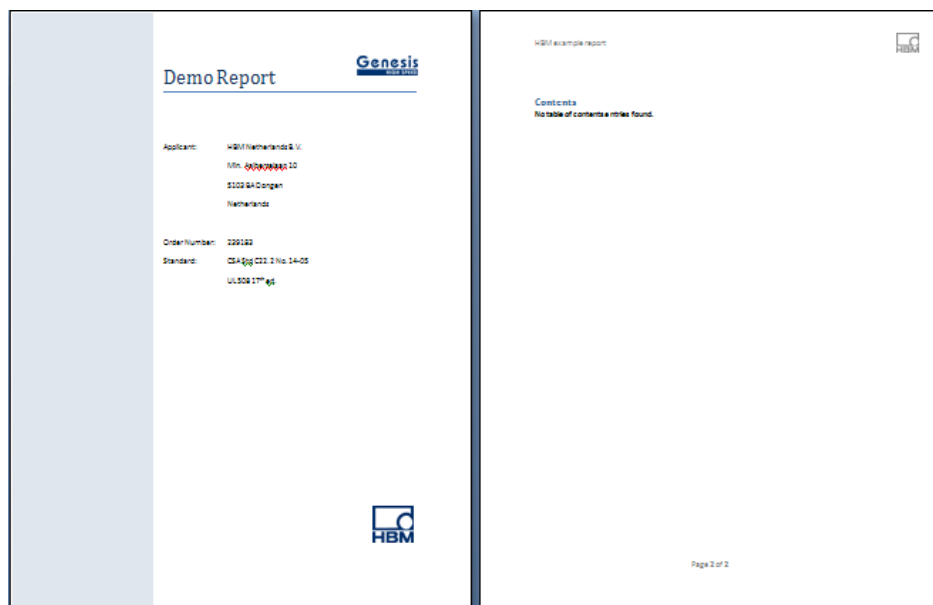
The **Word Organizer** sheet will help you to create new combined Word documents.



- A** The master document entry. Here you define which master document should be used.
- B** Select the format of the final report, this is either **Word** or **PDF**
- C** Defines how the Word document should be created: linked or unlinked. This feature is only enabled if the output file format is **Word**
- D** Here you define if new created document should be viewed automatically after creation.
- E** Select the folder where subdocuments can be found
- F** A list of all Word documents in the specified folder. From this list subdocuments can be selected to be used for the new Word document to be generated.
- G** Show extra Word properties columns.
- H** List of selected subdocuments to be used for the new Word document to be generated.
- I** Button to actually start the generation of the new combined document.

### 4.3 Master Document

The master document is a Word document which will be used to create a new combined document. Most of the time the master document contains the beginning pages of a report, like a title page and perhaps a table of contents. All the subdocuments will be added at the end of this master document, if a table of contents is present than it will be updated automatically. The master document also defines the headers and footers of each page. The picture below shows an example of a master file.



### 4.4 Linked versus Unlinked

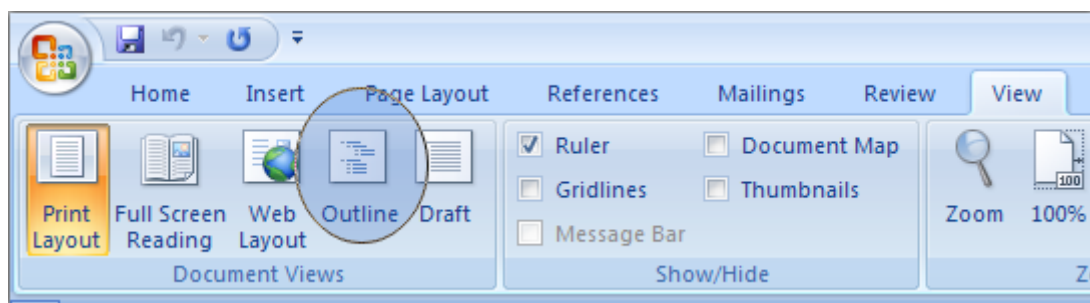
You can either create a **linked** or **unlinked** Word document, therefore you use the selection box **Create unlinked document** see **C** at picture above. When you have selected PDF as output format the output format is always unlinked.

If you choose linked then the new created Word document contains links to the physical sub document Word files. If you open a file like this it can look like:

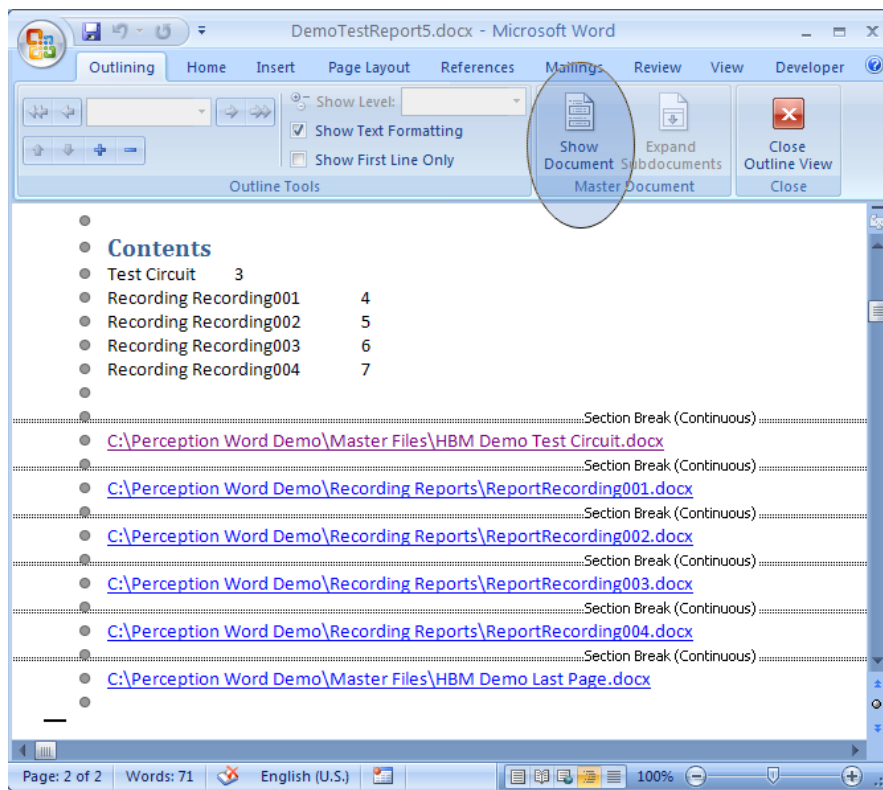




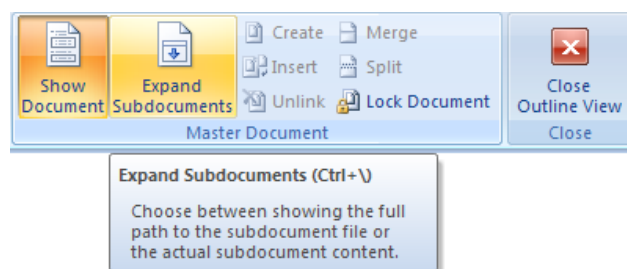
At the bottom of the master file the links to the subdocuments are shown in the same sequence as you have defined them in the **Selected Word Documents** list, see **H** in the sheet picture above. The file names work like a kind of hyper link if you do a **Ctrl-Click** then the linked file will be opened automatically. It is however also possible to expand the linked files in the master document. Therefore you should go to the view menu of **MS Word** and select **Outline** view



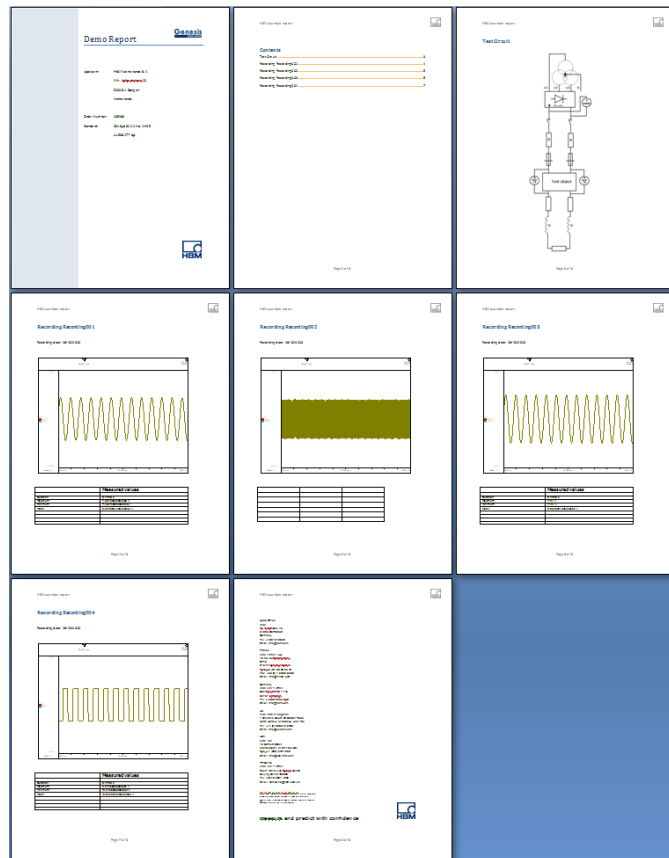
If you select this than MS Word will show the document in **Outline View**, this looks like the following picture.



Select now **Show Document** and MS Word will show the following menu:



Now you can expand all the subdocuments, if you do this and then close the Outline View than it looks like you have opened one large Word report file. However below the surface you are still looking at the content of the individual subdocuments. If one of these files is not available any more you will have a problem.



If you select **Unlinked** in the *Perception Word Organizer Sheet* and then generate a new Word document this document does not contain any links any more. Everything is saved in one single file with no dependencies to the subdocuments any more. We recommend using the unlinked option if you want to deliver a report to one of your customers.

#### 4.5 Steps to creating a combined Word document

The letters in the steps below refer to the picture of the **Word Organizer Sheet** as shown in a previous chapter.

- Select **Master document**, this can be all the time the same document, but if you have for example various title pages or different headers and footers it is possible to work with a variety of Master documents (**A**).
- Select the output format, **Microsoft Word** or **PDF** (**B**)
- Select whether or not the document to be created should be **linked** or **unlinked** (**C**)
- Now you have to select the subdocuments you want to use. To do this you can select a folder where the subdocuments can be found (**E**). All the Word documents of the selected folder will be listed in a table (**F**), you can change the order by clicking at the column headers.

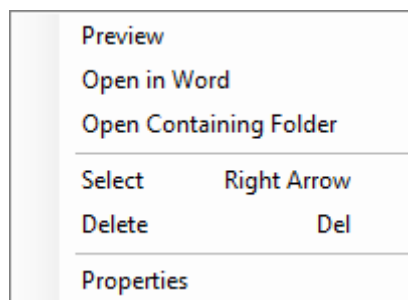
You can navigate to the parent folder by clicking at the button with green arrow icon . If the folder contains subfolders they will be shown in the list, by double clicking on them you can navigate to this subfolder.

- Now you can select those files from the *Available Word documents list*. You can do this by using the green “+” button . This button is only enabled if you have selected at least one document. It is also possible to use drag drop for selection or use the right arrow key. You can also drag drop directly from Windows explorer into the *Selected Word Documents list* (**H**).

- After you have selected all the subdocuments you can change the order by using the blue up and down arrow buttons on the right side of the selection list.  
The files in the *Selected Word documents list* can be documents which are created previously by the Word automation of Perception (see chapter **General**) but they can also be for example documents containing drawings of the measurement setup or a standard last page used for all final reports or whatever. Only **Microsoft Word** files are accepted, therefore if you want to add for example a picture or an Excel table put those items first in a separate Word file and add this file to the *Selected Word documents list*.
- Now setup is ready, you can click **Generate Final Report** to create your final combined Word report. If the “**View generated report after creation**” (D) is selected than either Microsoft Word or the installed PDF reader will be automatically started and will show the new generated Word or PDF file. If you did not select this view option than you don't see anything except that the busy cursor will indicate that the program is busy generating the Word or PDF document.

#### 4.6 Context menu *Available Word documents list*

When you do a right mouse click on one of the *Available Word documents list* (D) the following context menu pops up:

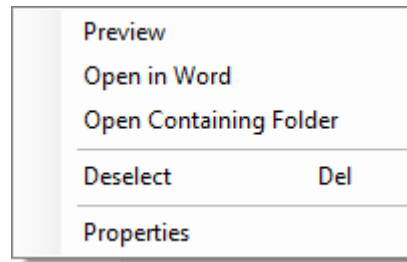


The menu items will now be explained.

- **Preview**  
A preview of the Word document is shown, this viewer is however limited and does not support all Word features, if files are too large they cannot be previewed, in those cases we recommend to open the document in Word to see its correct contents.
- **Open in Word**  
Opens the selected document in Microsoft Word, this can also be accomplished by a double click on the file name in the list.
- **Open Containing Folder**  
Opens Windows explorer and points to the folder where the selected Word document resides.
- **Select**  
Selects the selected document and adds it to the **Selected Word documents list** (H).
- **Delete**  
Deletes the selected Word document.
- **Properties**  
Shows the document properties of the selected Word file, see chapter *Word Properties* for more information

#### 4.7 Context menu *Selected Word documents list*

When you do a right mouse click on one of the *Selected Word files list (H)* the following context menu pops up:

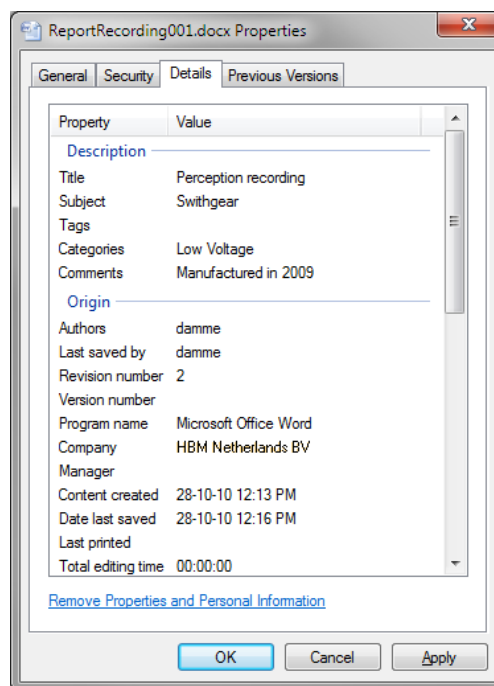


These menu items have the same functionality as the similar ones in the context menu for *Available Word files list* as described in the previous paragraph.

The **Deselect** is however unique for this menu and is used to remove a selected item from the selection (**H**).

## 4.8 Word Properties

Any object under Windows has Properties, which can be seen by right clicking on the object and choosing Properties from the popup menu in Windows Explorer.



Files in Explorer and My Computer have properties like the date they were created and the file size. Word documents have even more file properties. These may be visible only from within an Office application, depending on which versions of Word and Windows you are using. There are two types of document properties:

- Preset properties**  
 Preset properties already exist (such as author, title, and subject), but you must add a text value. For example, in Word, you use the Keywords property to add the keyword "customers" to your sales files and then search for all sales files with that keyword.
- Custom properties**  
 Custom properties are properties you define. You can assign a text, time, or numeric value to custom properties, and you can assign them the values "yes" or "no." You can choose from a list of suggested names or define your own.

Additional information on how to modify or create new custom properties can be found at the Microsoft Help, search for "*Document Properties*".

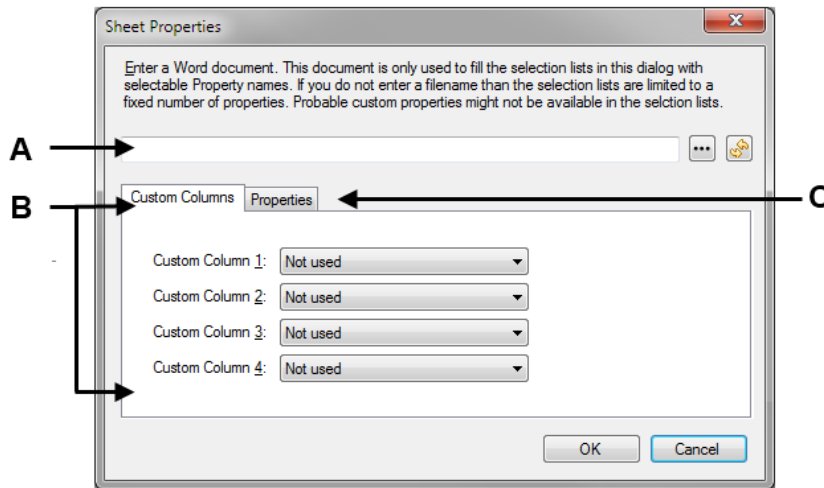
With the **Perception Word Organizer** sheet it is possible to use the **Document properties** to make the selection out of the available subdocuments easier. The properties can be added as additional columns in the *available Word documents list* (F). The list can be sorted on a specific property by clicking at the column header of the property column.

Properties can also be viewed using a special properties dialog which comes up after selecting the context menu item Properties.

### 4.9 Setting up the Perception Word Organizer to use Document properties

Before you can use the document properties in the **Word Organizer** sheet you have to define which properties you would like to use for the extra columns, you also can define which properties should be shown in the properties popup dialog.

The setup for this can be found by selecting **Word Organizer -> Properties** in the menu bar. The Sheet Properties dialog is now shown.




- A** Word document (Optional)
- B** Custom Columns definition
- C** Definition of the Document Properties to be shown in the properties popup dialog

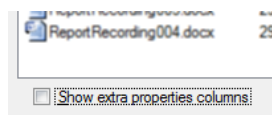
The Custom Column boxes are used to define the extra property columns in *the available Word documents list (F)*. A maximum of 4 additional columns can be defined.

The default selection list in these boxes is:

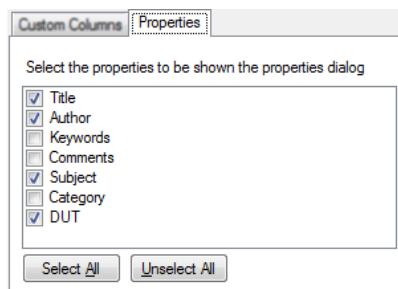
- Not used
- Title
- Author
- Keywords
- Comments
- Subject
- Category
- DUT

However it is possible that you are working with Word documents containing unique custom properties, to be able to select those properties as well you have to enter an arbitrary Word document name containing those properties into the text field **A**. After you have entered the correct name you have to press the refresh button , after this the selection items in all the custom column boxes are updated with all document properties found in the entered Word document.

If you have defined the custom columns and you want to see them in the *Available Word documents list*, then you should enable the **“Show extra properties columns”** selection box at the bottom of the list.



The properties shown in the popup properties dialog are defined using the **Properties** tabulator.

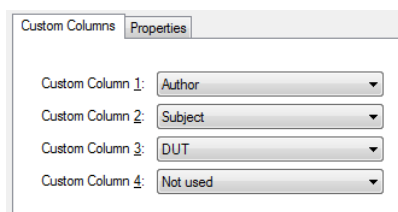


Select the properties you want to show in this dialog.





#### 4.10 An example of configuring the custom properties columns

The following example shows the relation between the setup and the way the *Available Word documents list (F)* changes.

If the setup is as follows:



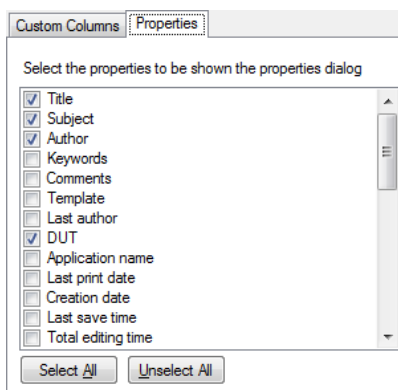
Then the *Available Word documents list (F)* can look like:

Name	Creation Date	Author	Subject	DUT
 ReportRecording003.docx	29-10-10 09:00 AM	Smith	Switchgear Type A3	SW 235
 ReportRecording001.docx	29-10-10 09:00 AM	damme	Switchgear Type A2	SW 234
 ReportRecording002.docx	29-10-10 09:00 AM	Smith	Switchgear Type A2	SW 234
 ReportRecording004.docx	29-10-10 09:00 AM	damme	Switchgear Type A2	SW 235

#### 4.11 An example of configuring the custom properties popup dialog

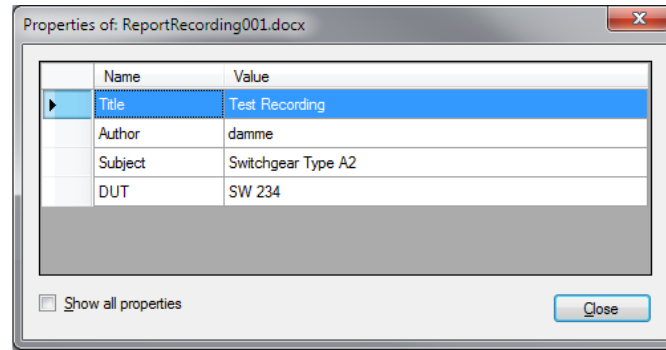
The following example shows the relation between the setup and the way the popup properties document list changes.

If the setup is as follows:





Then the popup document properties dialog looks like:



This dialog can be shown via the context menu in the Word documents list (F).

## 5 Setting up Word reporting in Perception

### 5.1 Introduction

This chapter describes how you can setup Word reporting in Perception, this is standard functionality of Perception and therefore has nothing to do with the **Word organizer** CSI sheet. It is only added to this manual for convenience because the current Perception manual contains only a very brief description.

Word reports can be created using the **Perception Automation Action**. Those actions are used by various *Automation* parts.

A summary:

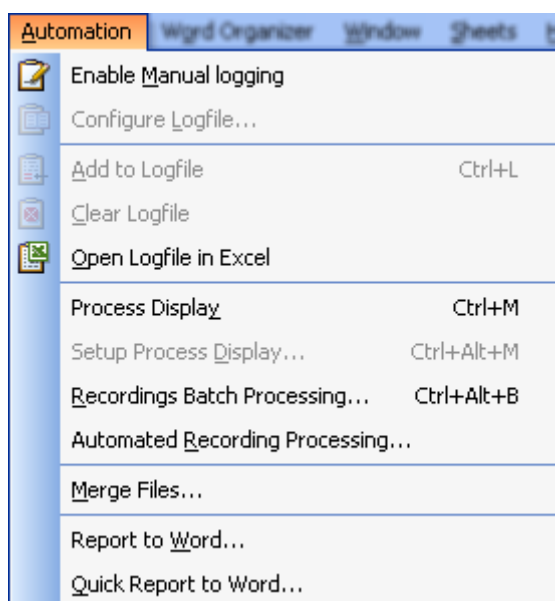
Use **Setup Process Display** and **Process Display (Ctrl-M)** to create manually a Word report linked to a specific display.

Use **Recording Batch Processing** if you want to create Word reports after you have done a number of recordings.

Use **Automated Recording Processing** if you want to create a Word report automatically after each recording.

Use **Report to Word** to create manually a Word report.

Use **Quick Report to Word** to create manually a Word report by using a very simple report layout.

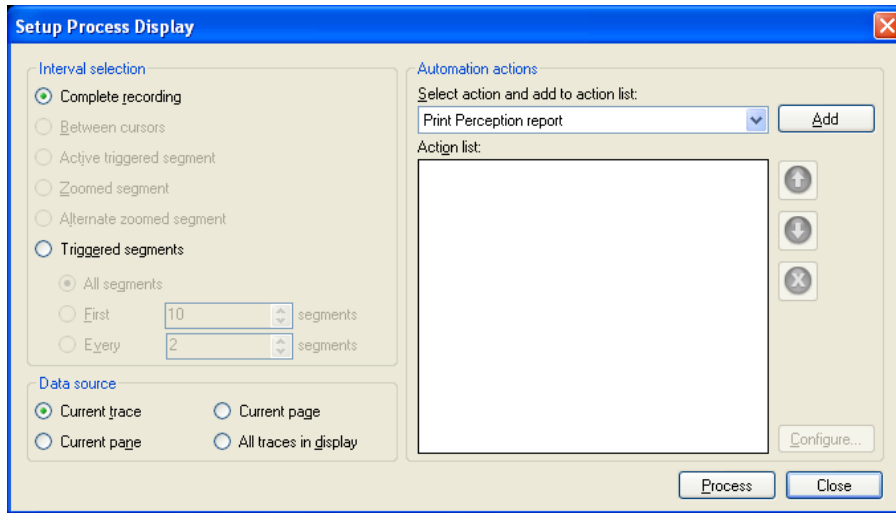


### 5.2 Report to Word action used by Setup Process Display

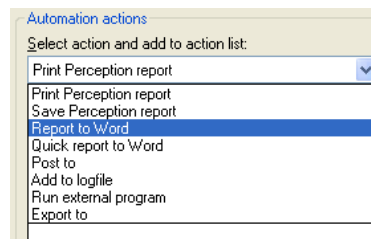
In this chapter we will focus on setting up a **Report to Word** action. We will use the *Process Display* setup to illustrate this.

Select the menu **Automation -> Setup Process Display** from the menu bar. If this menu item is disabled make sure that you have an active display in the selected sheet.

The following setup dialog will be shown:

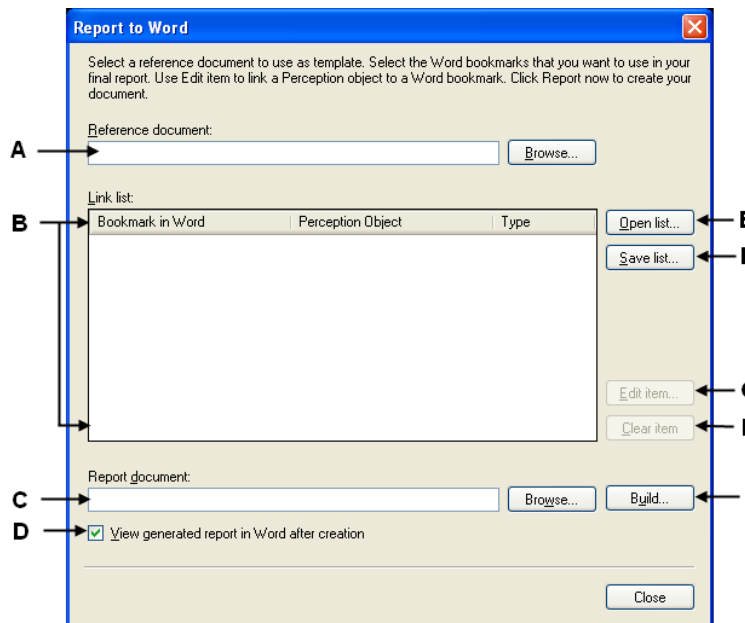


Select the **Report to Word** action from the action list.



### 5.2.1 Report to Word configuration dialog

Add this action to the **Action list** by clicking the **Add** button. Now you have to configure the Report to Word action. Click the **Configure** button and the following dialog comes up:



**A** Name of the reference document which will be used as the template for new Word documents to be generated.

- B** **Link list.** This list shows all the links between the bookmarks from the Word document and the Perception objects.
- C** The name and folder where the newly generated Word documents will be saved
- D** Open Word after report generation and show the latest generated document
- E** Open an existing **Link list** containing links between bookmarks and Perception objects. This can be used to accelerate the setup procedure of a new configuration.
- F** Save the current **Link list**. This saved list can be reused later when setting up a new configuration.
- G** Edit an item from the Link list. Via this menu the relation between the Bookmark and the Perception object will be defined.
- H** Clear an item means that the link to the Perception object will be cleared.
- I** When clicking the **Build** button the **Build Storage Path and File Name** dialog is called. This dialog allows you to build a file name and full storage path based on Perception system variables.

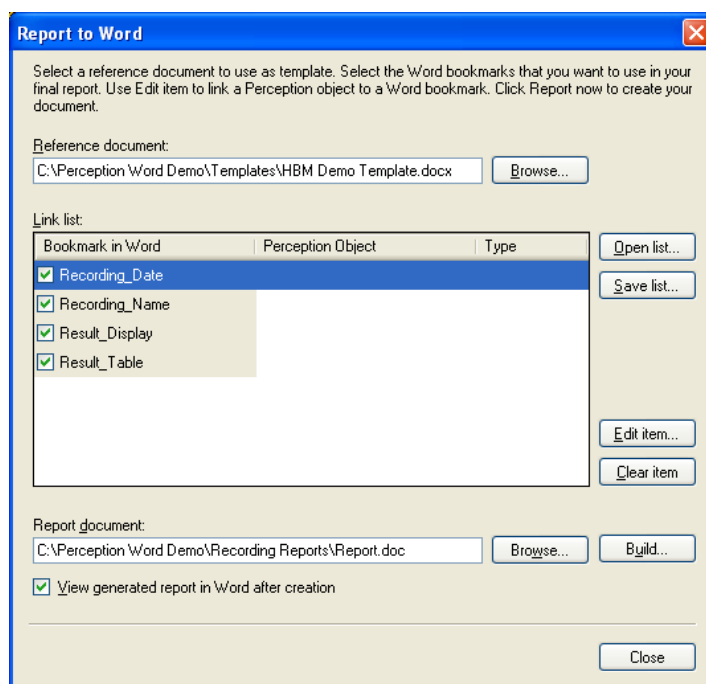
The install comes with some demo files which you can use to do these explanation steps yourselves. First you have to define the reference document (**A**). This reference document will be used as a template for your Word reports. In the template there are placeholders on locations where Perception objects have to be inserted. These placeholders are called "**Bookmarks**" in Word.

How to add bookmarks to a Word template file is described in the chapter: **How to add Bookmarks to a Word template file** which can be found in this manual.

If you enter the following *Reference document* name:

***C:\Perception Word Demo\Templates\HBM Demo Template.docx***

Than the **Report to Word** dialog looks like:



After entering the reference document name Perception will search for all the bookmarks in this document and show them in the **Link list** (**B**). In this demo you can see that Perception found 4 bookmarks:

- *Recording\_Date*
- *Recording\_Name*
- *Result\_Display*

- *Result\_Table*

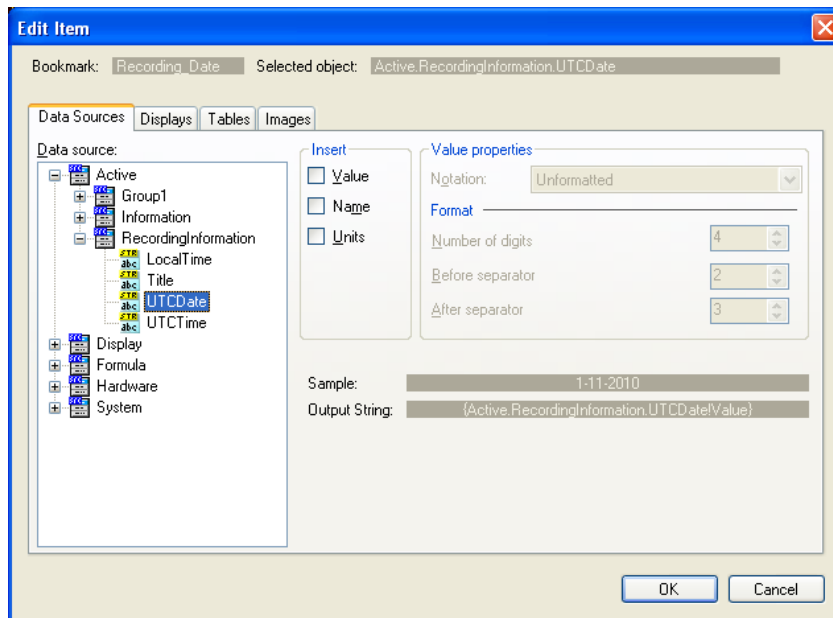
The next step is to link these bookmarks to Perception objects.  
 Perception has 4 different kinds of objects which can be linked to a bookmark:

- Data sources
- Displays
- Tables
- Images

**5.2.2 Edit Item dialog**

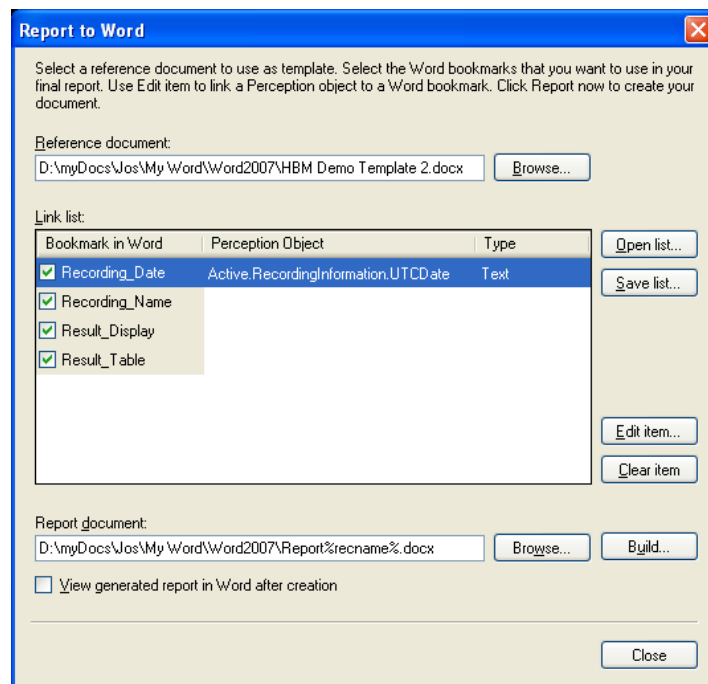
Let us start with the first bookmark called **Recording\_Date**. Select this bookmark from the Link list and click the **Edit item** button (G). The edit Item dialog will be shown. This dialog is used to define the link between the bookmark and a Perception object. As you can see the dialog has 4 tabulators related to the 4 different kinds of Perception objects available for linking the bookmarks.

The **Recording\_Date** will be linked to the *Data Source* **Active.RecordingInformation.UTCDate**, you can see this in the dialog below.

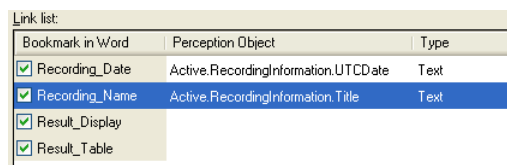


If the **RecordingInformation** *Data source* is not present than open an existing recording as active or just make a new recording.

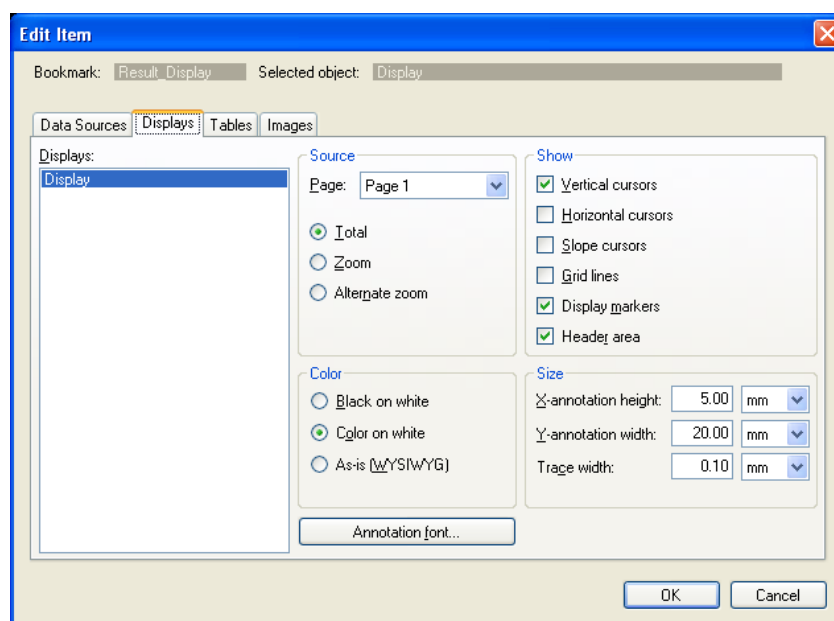
After you have closed the **Edit Item** dialog the new established link between the Word Bookmark and Perception Object is shown, see next picture.



Repeat this for the **Recording\_Name** bookmark and link it to the *Data Source Active.RecordingInformation.Title* see next picture.



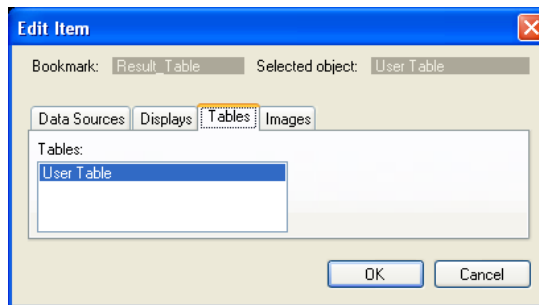
The next bookmark **Result\_Display** will be linked to the active display. To do this you have to select the **Result\_Display** bookmark in the Link list and then click the **Edit item** button. In the **Edit Item** dialog you have to select the **Displays** tabulator, see next picture.



This dialog shows all available displays in Perception, in this case there is only one display and it is called **Display**. At the right side of the dialog you can configure the way the display should be shown in your Word document. If you have set the correct configuration you can close this dialog and the **Link list** will be updated.

Bookmark in Word	Perception Object	Type
<input checked="" type="checkbox"/> Recording_Date	Active.RecordingInformation.UTCDate	Text
<input checked="" type="checkbox"/> Recording_Name	Active.RecordingInformation.Title	Text
<input checked="" type="checkbox"/> Result_Display	Display	Display
<input checked="" type="checkbox"/> Result_Table		

The last bookmark **Result\_Table** will be linked to a Perception user table. Select this bookmark in the **Link list** and click the **Edit item** button. In the **Edit Item** dialog you have to select the **Tables** tabulator, see next picture.

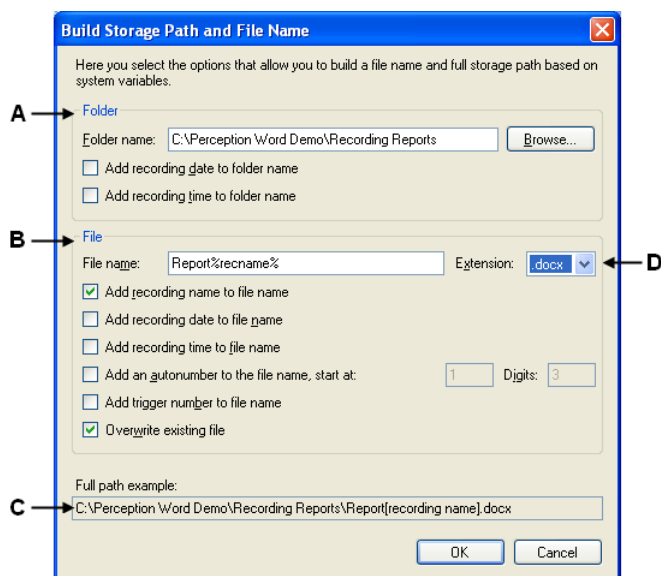


This dialog shows all available user tables in Perception, in this case there is only one table and it is called **User Table**. There are no configuration possibilities. If you have selected the correct user table you can close this dialog and the **Link list** will be updated.

Bookmark in Word	Perception Object	Type
<input checked="" type="checkbox"/> Recording_Date	Active.RecordingInformation.UTCDate	Text
<input checked="" type="checkbox"/> Recording_Name	Active.RecordingInformation.Title	Text
<input checked="" type="checkbox"/> Result_Display	Display	Display
<input checked="" type="checkbox"/> Result_Table	User Table	Table

### 5.2.3 Build Storage Path and File Name

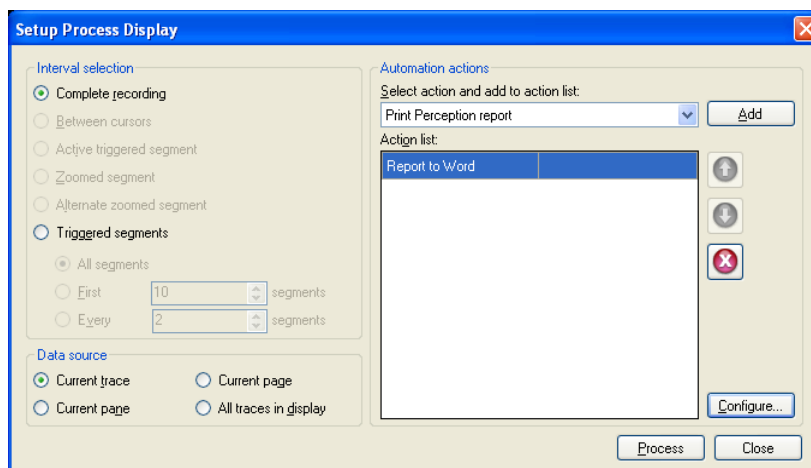
Now all bookmarks are linked to a Perception object. The next think to do is to define the name and location of the Word files to be generated. This will be done entering a name into the Report document text box (C). This name can be manipulated to make it possible to create for example a new unique name each time a Word document is generated. To do this click the **Build** button (I). The following dialog shows up:



- A** Defining the location or storage path of the Word file to be generated. The folder name can be linked to the recording date and / or recording time.
- B** Defining the name of the Word files to be generated. Various system variables can be used to automatically compose a new name.
- C** Example of the full path
- D** The extension of the Word document to be generated, we advice to use .docx

For this demo you can select the same settings as shown in the picture above.

Now you are ready with the complete setup and the system is ready to generate the new Word documents. This can be done in various ways. It is always advisable to create a test to check if your configuration is ok. The easiest way is to click the **Process** button in the **Setup Process Display** dialog, see figure below.



If the test document is OK you are ready to use the Report to Word during post evaluation of your recorded data. In our example this can be done via the menu **Automation -> Process Display** from the menu bar. If you have the display with the data active you can also simply used the short cut key combination **<Ctrl> M**.

During this demonstration we added a **Report to Word** action to the **Process Display** automation feature, but you can add the same action to **Recording Batch Processing** and **Automated Recording Processing**.

Use the **Recording Batch Processing** if you want to create a Word report for a (large) number of recordings you have selected. All reports will have the same layout but the actual data, calculations




etc. are recording specific. Once you have created those word reports you can use the **Word Organizer** to create a nice overall combined end report.  
If you want to have a Word report automatically after a recording is finished without extra operator handling you have to use **Automated Recording Processing**.

### 5.3 How to add Bookmarks to a Word template file

A bookmark identifies a location or a selection of text that you name and identify for future reference. For example, you might use a bookmark to identify the date of a recording, each time Perception is generating a Word report with this template file the specified bookmark will be replaced by the actual date of the current recording.

You can assign a bookmark to a word **item** then the bookmarked item appears in brackets ([...]). If you assign a bookmark to a **location**, the bookmark appears as an I-beam. The brackets and the I-beam do not appear in printed documents.

If you want to add bookmarks to your template file it is recommended to enable the **Show bookmarks** option in Words.

- Click the **Microsoft Office Button** , and then click **Word Options**.
- Click **Advanced**, and then select the **Show bookmarks** check box under **Show document content**.
- Click **OK**.

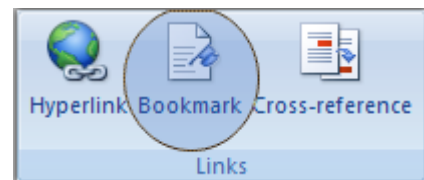
This chapter will describe 4 different kinds of bookmarks. These bookmarks are:

- **Insertion Point**: Marks only the position of the bookmark the size is not defined.
- **Text**: Just plain text in a placeholder.
- **Image**: A picture can be contained in placeholder.
- **Table**: The bookmark holds a Table in it.

#### 5.3.1 Insertion Point Bookmark

To add an insertion point bookmark do the following steps:

1. Put the cursor at the position where you want to insert the bookmark



2. On the **Insert** tab, in the **Links** group, click **Bookmark**.
3. In the bookmark dialog you can enter the name of the bookmark, and click **Add**. When this is done the bookmark is visualized like: **I**

#### 5.3.2 Text Bookmark

If you want to insert a text bookmark you first have to select some text and then click **Bookmark** and enter a name for this bookmark. See steps 2 and 3 above.

When done correctly the bookmark looks like: **[selected text]**

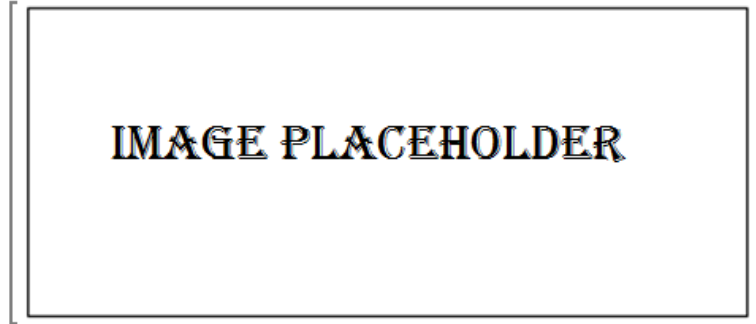
Note: The selected text will be replaced by the object linked to it.

#### 5.3.3 Image Bookmark

The **Image** bookmark is best used when you want to post a Perception **Display** or **Image** object into a Word document.

To insert an image bookmark you need to insert an arbitrary picture and size it to the size you want the posted Perception object to be. Then select this image and click **Bookmark** and enter a name for this bookmark. See steps 2 and 3 above.

When done correctly the bookmark looks like:



The “smart” functionality of this type of bookmark is that when a Perception **Display** or **Image** is posted to this type of bookmark that it will get the size of the image in the bookmark. The original image will be replaced.

### 5.3.4 **Table Bookmark**

The **Table** bookmark is used when you want to post a Perception **User Table** object into a Word document.

To insert a **Table** bookmark you first need to insert a table into Word, the number of columns or rows doesn’t matter because they are defined by the Perception **User Table** which will be posted to this bookmark. After you have inserted the table you should select it (click at cross at top-right of table) and click **Bookmark** and enter a name for this bookmark. See steps 2 and 3 above.

When done correctly the bookmark looks like:


The “smart” functionality of this type of bookmark is that when a Perception **User table** is posted to this type of bookmark it will get the same width as the placeholder. The columns inside are scaled proportionally.

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