Switching to HTML rich texts and the new rich text editor

From **2022 R4**

Sage X3 now uses HTML for rich texts

Sage X3 now uses a new HTML rich text editor that can be enabled to use HTML for all rich texts in the application.

Historically, Sage X3 has used RTF for rich texts embedded in the application. Rich texts are used mostly for customer-facing texts attached to documents such as Sales Orders, Invoices, or labels, and also for some internal documents.

RTF is a proprietary format initially promoted by Microsoft® to allow the exchange of rich text between applications in the Office suite and other text-editing software. Although it still occasionally appears in the Microsoft® context, it has been largely superseded by HTML5.

From 2022 R4, the Sage X3 rich texts can now use HTML. This avoids most of the issues that appear when rich texts are translated back and forth from RTF to HTML to be displayed on screen. The HTML scope used by X3 has been adapted to cover only features supported by Crystal Reports for all texts that may appear in a report. This is to guarantee maximum similarity between the report (rendered using Crystal Reports) and the text displayed on screen (rendered by your device's browser).

Solving rich text editor issues with the new editor

The move to HTML solves all rich text editor issues that were related to the back-and-forth conversion from RTF to HTML, mostly around the differences between rich text features as displayed on screen, and as printed through Crystal Reports.

You can switch to HTML progressively and painlessly

From Sage X3 2022 R4, you can activate the flag **Use HTML for rich texts** in **Administration > Global Settings**. This enables a new HTML rich text editor in all of Sage X3.

When this is done:

- Any rich text *created or modified* from that point on *will be **stored as HTML***.
- Existing texts *that have not been modified* will still be ***stored as RTF***.

This allows you to progressively move to HTML with no disruption to existing rich texts.

However, this requires you to review your custom reports using Crystal Reports designer, to modify the fields that display rich text so they can display **both RTF and HTML** during the transition phase. This is done simply by modifying the formula used in Crystal Reports to determine how to format a rich text field.

The estimated update work is around 5 to 10 minutes per report.

This work has been done by Sage in the 64 standard reports that contain rich text fields.

Reports that do not use any rich text field do not require any modification.

You can modify the reports before switching to HTML text. Reports will continue displaying RTF as usual.
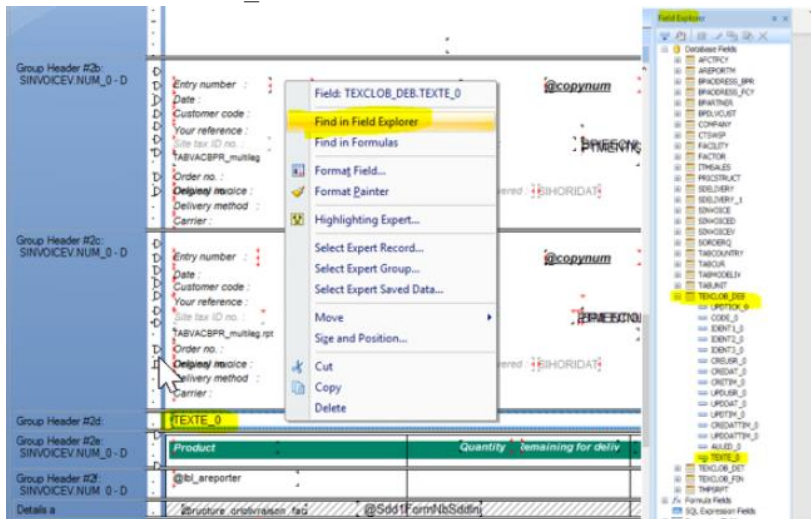
Methodology

The following is a step-by-step guide on how to switch rich text management to HTML:

1. Check and modify your reports if needed

The first step is to enable your reports to display both RTF and HTML texts.
NOTE: This has been done by Sage in all standard reports delivered with Sage X3, Sage X3 HR and Sage X3 Warehousing. You need only review reports that you have customized or created.

- Review your custom reports and locate any reports that use rich text fields. In the example below, we find field TEXTE_0:

- In the field's properties, switch the field's **Text interpretation** value from **RTF text** to **None**, and open the **formula** window using the formula button:

- In the formula, enter the following code:

If Left({TEXTCLOB_DEB.TEXTE_0},5) = "{\rtf" Then crRTFText
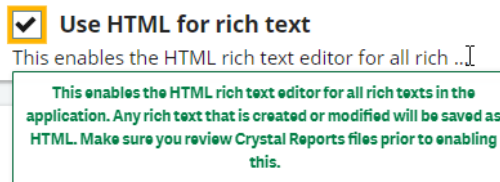
Else crHTMLText

This instructs Crystal Reports to interpret the text as RTF if formatted as such, and HTML otherwise. If the text is raw (no formatting), the Crystal Reports HTML engine will display it as such.

- Repeat for all rich text fields in the report and save.

2. Switch Sage X3 to HTML richt text and the new rich text editor

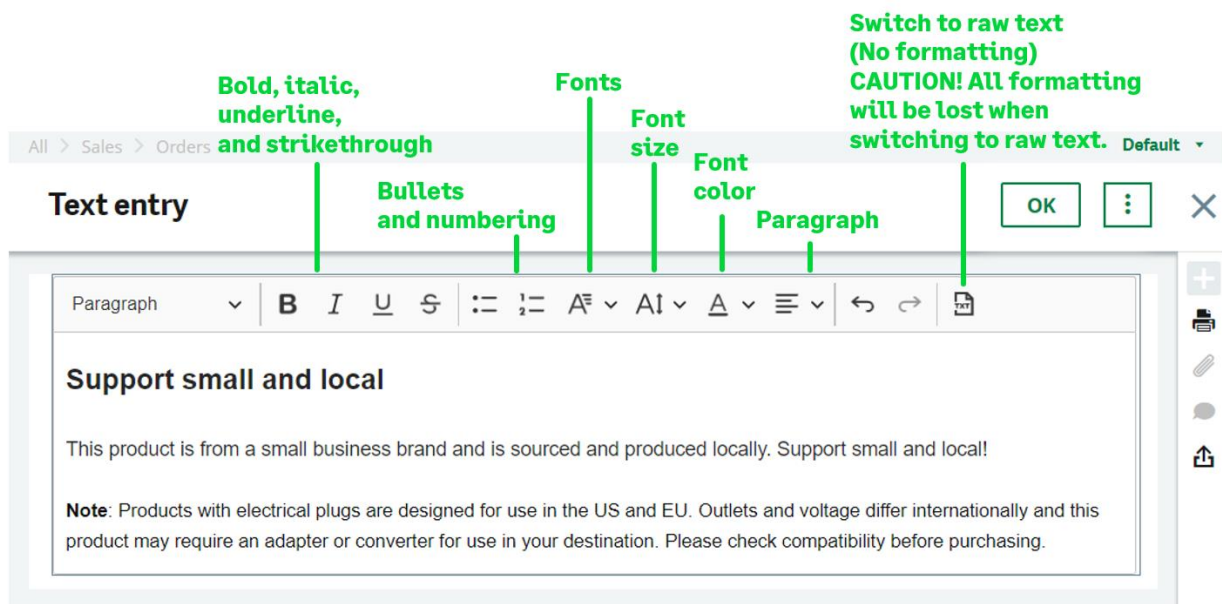You can now switch the Sage X3 interface to use the new HTML rich text editor:

- Log into Sage X3
- Go to **Administration > Global Settings**
- Enable the flag **Use HTML for rich text**:

☑ **Use HTML for rich text**
This enables the HTML rich text editor for all rich ...

> This enables the HTML rich text editor for all rich texts in the application. Any rich text that is created or modified will be saved as HTML. Make sure you review Crystal Reports files prior to enabling this.

- There is no need to restart the Sage X3 Web Server. Any user who logs into the application will use the new rich text Editor.

The new HTML rich text Editor

The new rich text Editor is intuitive and has a simple interface:

A certain number of text formatting features such as tables, HR separations (line breaks) and indentation have been disabled because they are not supported by the Crystal Reports HTML engine. Please see Appendix 1 for more detail.

The inclusion of active links and images has been disabled for security reasons for rich text fields.

Appendices

1. Unsupported HTML features in Crystal Reports

Crystal Reports HTML text interpretation supports a limited set of HTML tags and attributes covering basic text formatting only. As an example, tables and text indentation are **not supported** or partially supported by Crystal Reports HTML rendering. Those options have been disabled from the rich text editor.

This is not an exhaustive list and it merely outlines a few of the HTML features that are not supported. In general, advanced non-formatting HTML5 features are not supported by the Crystal Reports HTML engine.

Please refer to the the SAP Crystal Reports documentation or knowledge base (you must be logged in to access this link) for a full list of supported HTML tags and attributes.

2. A list of Sage X3 standard reports that include rich text fields

CR report file	Module	Number of rich text fields
SBONFAC	Sales	3
BONLIV	Sales	3
BONCDE	Purchasing	3
BONRET	Purchasing	3
BILLLAD	Common Data	9
SBONFAC9	Sales	3
SBONFACP	Sales	3
SBONFACP2	Sales	3
SBONFAC2PI	Sales	3
SBONFACP9	Sales	3
SBONFACP92	Sales	3
SBONFAC92PI	Sales	3
BONLIV2	Sales	3
BONLIV2PI	Sales	3
BONLIV9	Sales	3
BONLIV92	Sales	3

BONLIV92PI	Sales	3
BONLIVTTC	Sales	3
BONLIVTTC2	Sales	3
BONLIVTTCPI	Sales	3
BONCDE2	Purchasing	3
BONCDE2B	Purchasing	3
BONCDE2PI	Purchasing	3
BONCDEOUV	Purchasing	3
BONCDEOUV2	Purchasing	3
BONRET2	Purchasing	3
BONRET2PI	Purchasing	3
BONRETLIV	Purchasing	3
BONAOF	Sales	3
BONAOF2	sales	3
BONDLOUV	sales	3
BONDLOUV2	sales	3
BONTTC	sales	3
BONTTC2	sales	3
BONTTC2PI	sales	3
RELBONAOF	sales	1
RELBONAOF2	sales	1
ARCCLIENT	sales	3
ARCCLIENT2	sales	3
ARCCLIENT2PI	sales	3
ARCCLIENT9	sales	3
ARCCLIENT92	sales	3
ARCCLIENT92PI	sales	3
ARCCLIOUV	sales	3
ARCCLIOUV2	sales	3
ARCTTC	sales	3
ARCTTC2	sales	3
ARCTTC2PI	sales	3
BONPRELIV	sales	3

BONPRELIV9	sales	3
BONPRELIVP	sales	3
BONPRELIVP9	sales	3
DEVICLIENT	sales	3
DEVICLIENT2	sales	3
DEVICLIENT2PI	sales	3
DEVICLIENT9	sales	3
DEVICLIENT92	sales	3
DEVICLIENT92PI	sales	3
DEVTTC	sales	3
DEVTTC2	sales	3
DEVTTC2PI	sales	3
QCANYS	Stock	3