Customizing - Reports

Customize the logos and designs of reports

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AUTHOR	Docusnap Consulting
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1. INTRODUCTION

To create uniform documentation using Docusnap, it is desirable to use a global design template. In Docusnap's reporting system it is therefore possible to adapt the appearance of your company (CI) in the form of your own logos, colors, and fonts.

This HowTo gives you a short description how to customize the layout of the reports to your needs and desired formatting.

The document is divided into the following chapters:

- Chapter 2 Structure of a report: Here you will get an insight into the basic structure of the master template and its structure.
- Chapter 3 Individual adjustments: This chapter describes how you can make the actual adjustments.
- Chapter 4 Further topics: The last chapter discusses topics that differ from the standard requirements.

2. STRUCTURE OF A REPORT

The reports in Docusnap are composed of the following elements, among others

- Cover page
- header and footer

These elements are managed in the Master Report template. If you want to make an adjustment to the header and footer, for example, to the logo, this is done centrally in the master report template. This adjustment is then automatically available in all reports.

3. INDIVIDUAL ADJUSTMENTS

3.1 CARRY OUT STANDARD ADJUSTMENTS

3.1.1 DEPOSIT OF OWN LOGOS

As already described in the previous chapter, there is a header line in the reports, among other things. This is where the logos are displayed. You have the possibility to deposit your logos both on the top left and on the top right.

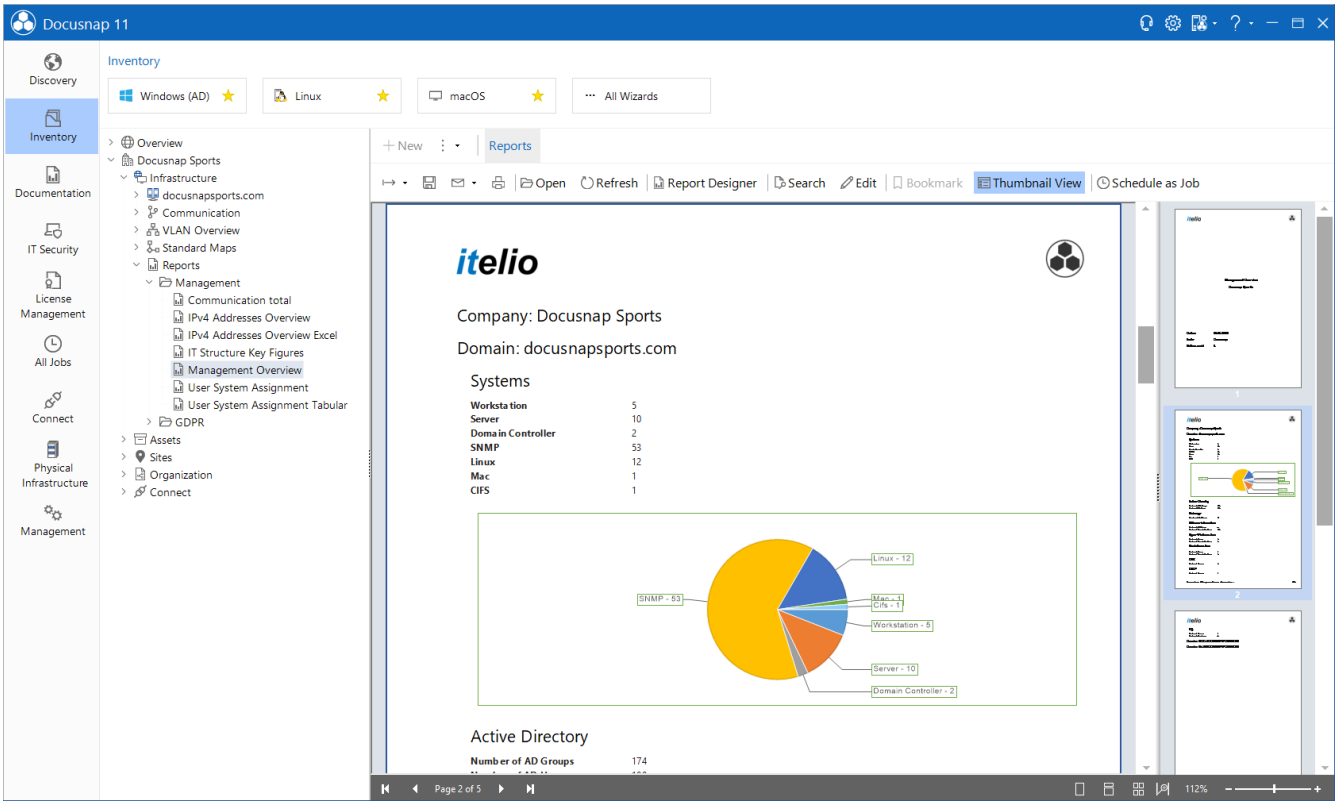

Figure 1 - Logos in the header

You can adjust the logos in Administration - Customizing - Layout (CI).

The drop-down menu lists the following selection:

- General

In the General section you can customize the logo of the reports, which can be found in the upper left corner of the header. You can also customize the design/color scheme here.

- Name of your client

If you select your/your company, you can customize the logo of the reports, which can be found in the upper right corner of the header. You can also select a specific design/color scheme for this company.

You can use the available buttons to make the desired adjustments:

- **Select** - There you can select and save your desired image file
- **Remove Logo** - Removes the currently stored
- **Reset** - Inserts the default logo

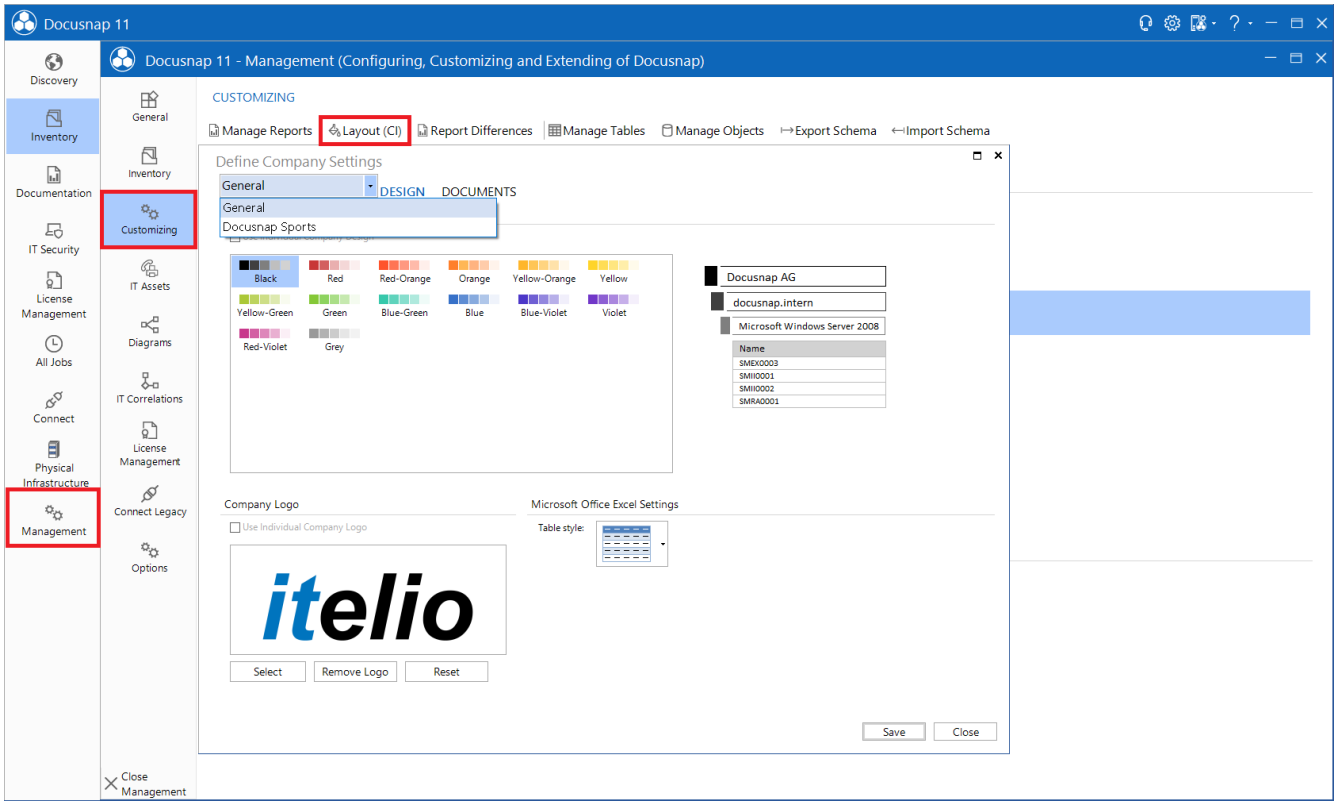

Figure 2 - General and Client context menu

3.1.2 ADAPTATION OF THE DESIGN

In addition to the logos, individual color schemes can also be selected for the reports. The following screenshot shows that Docusnap provides some designs by default. If these are not sufficient, you can also create your own designs - Create your own designs.

The adjustment of the color scheme is done in Administration - Customizing - Layout (CI). The setup can again be adapted for each of the available clients.

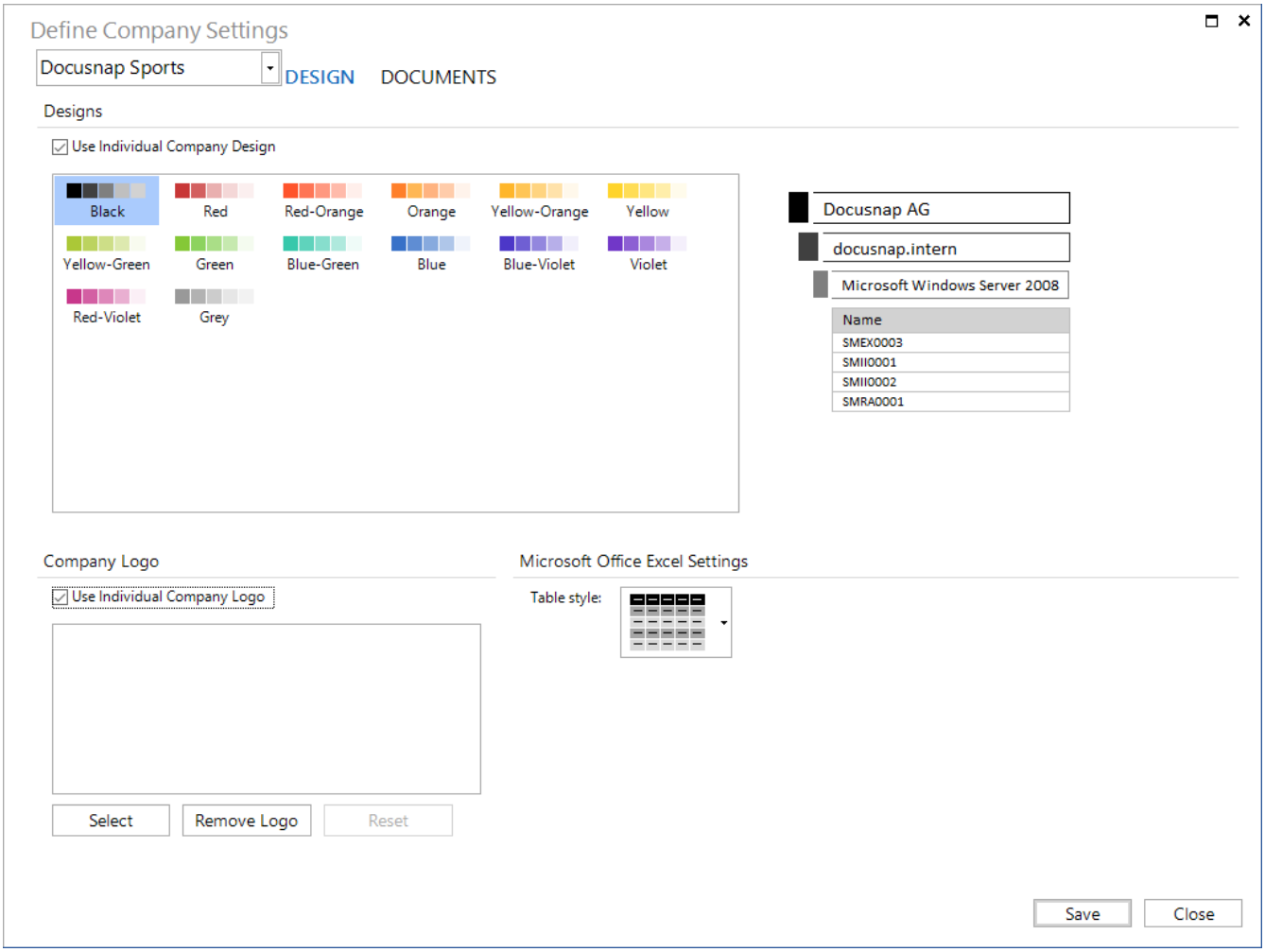

Figure 3 - Selecting specific color designs

3.1.3 FURTHER OPTIONS

Using the Documents context menu, you can access further options that affect the creation of reports.

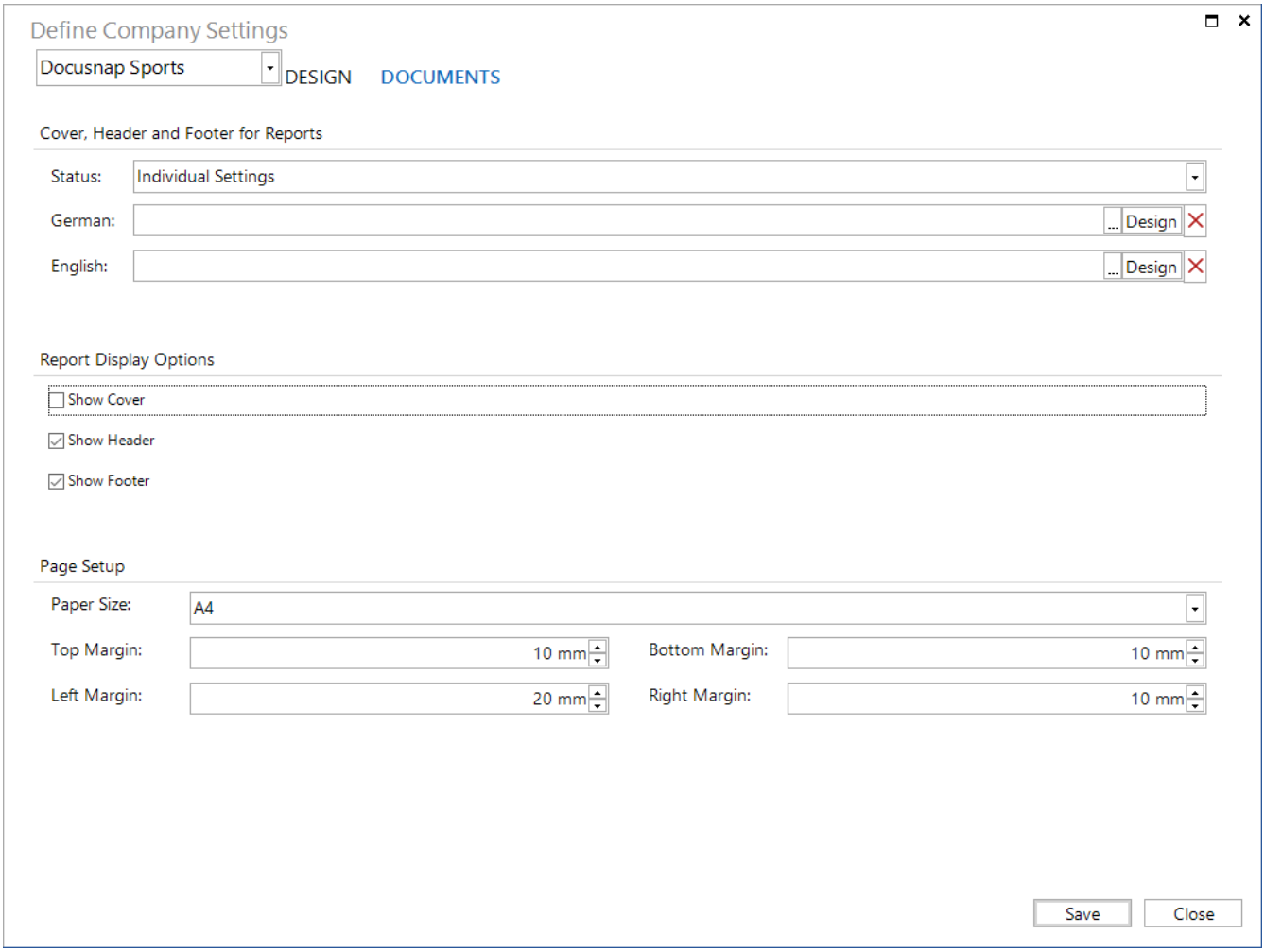

Figure 4 - Report display options

Report display options

Report display options allow you to make adjustments that determine whether the **cover, header, and footer** appear in reports.

You can also make these adjustments for selected clients only. To do this, select the client. For the **status - Select individual setting.** The changes now made then refer to the selected client.

Page setup

There is also a setting option to set up the report pages. Here, adjustments can be made to the paper format and the page margins. These changes become effective either generally or below the respective client.

4. MAKING ADVANCED ADJUSTMENTS

As advanced customizations, changes can be made directly in the master report template - for example, author customization. To open the master report template, proceed as follows:

Administration - Customizing - Layout (CI) - Documents - Design

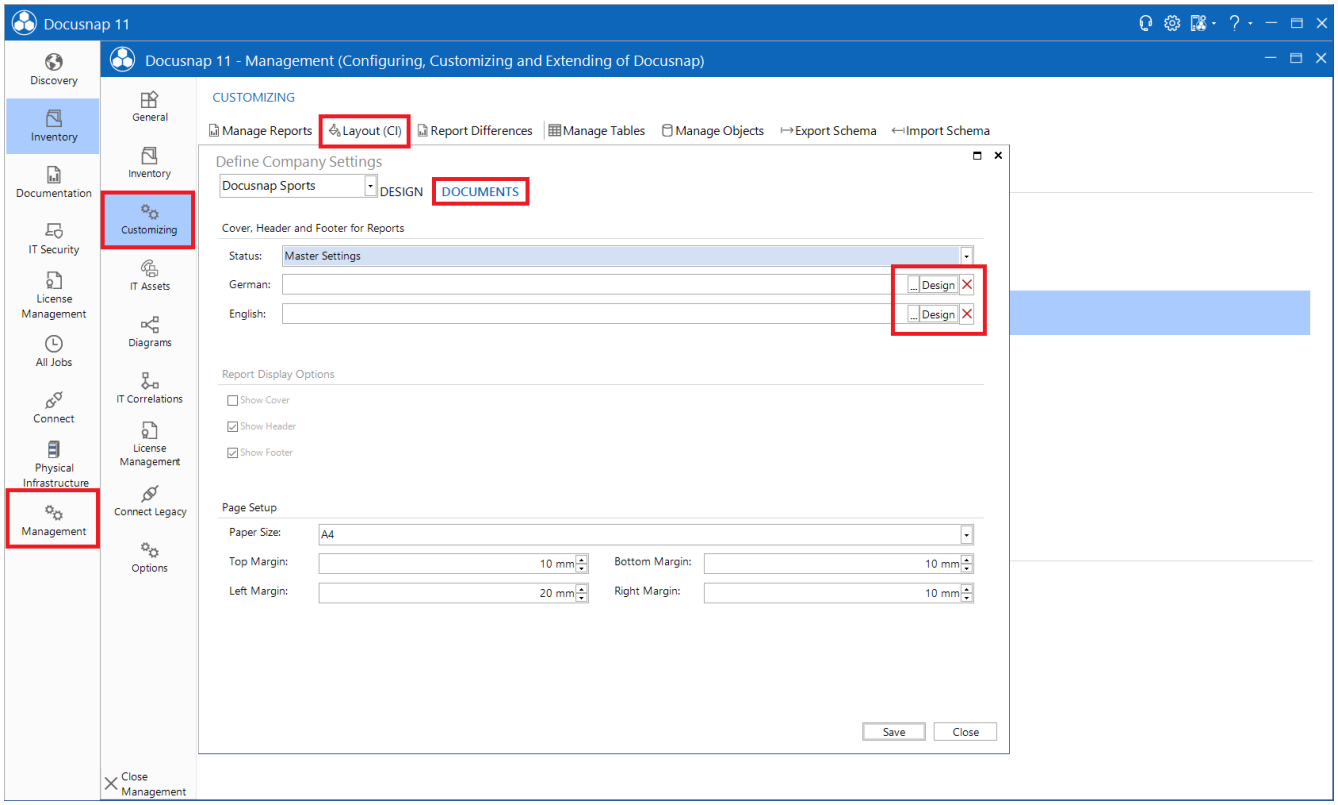

Figure 5 - Opening the Master Report template

4.1 MASTER REPORT TEMPLATE

The master report template contains the following components, on which adjustments can be made:

- Cover, Header, Footer
- CoverLandscape, HeaderLandscape, FooterLandscape

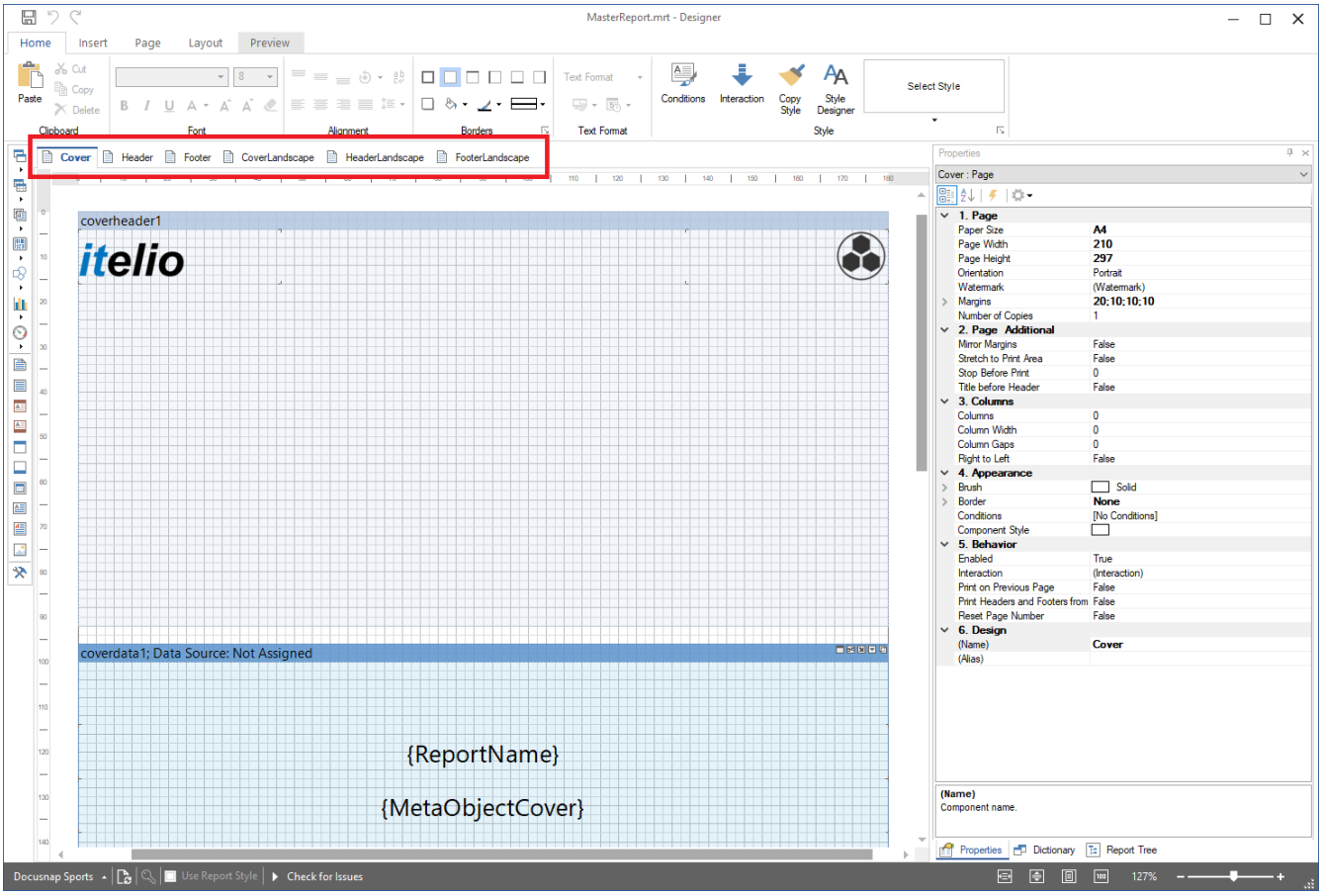

Figure 6 - Components of the master report template

On the cover page of the reports you will find, for example, the logos, the report name, the date, the author and the page numbers. These are defined as variables. If you want to make an adjustment here, you can do this by double-clicking and adjusting the printout.

For example, to customize the author, remove the **expression** {ReportAuthor} and replace it with your static content - e.g. IT Department.

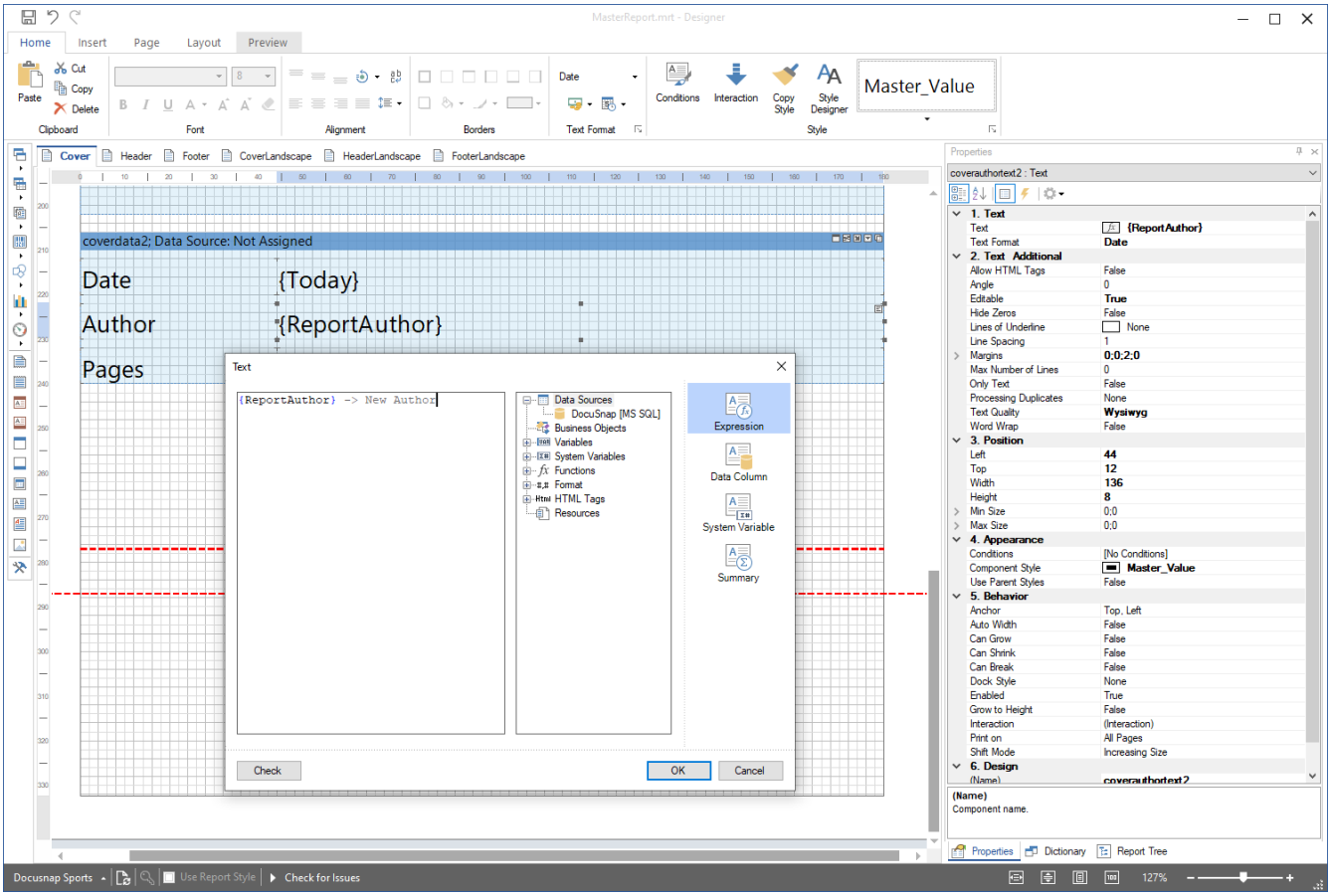

Figure 7 - Components of the master report template

5. FURTHER TOPICS

5.1 CREATE YOUR OWN DESIGNS

If it is desired to create your own color schemes and designs, this can also be realized with Docusnap. Open Docusnap **Administration - General - Designs**.

Use the left column to define the color design for General or the desired client. If a design is created below a client, it will then only be available for the specific client.

The design should always be created for **General**. After selecting General, you can select the colors for the layers, borders, and column labels in the **Edit Design Colors** area.

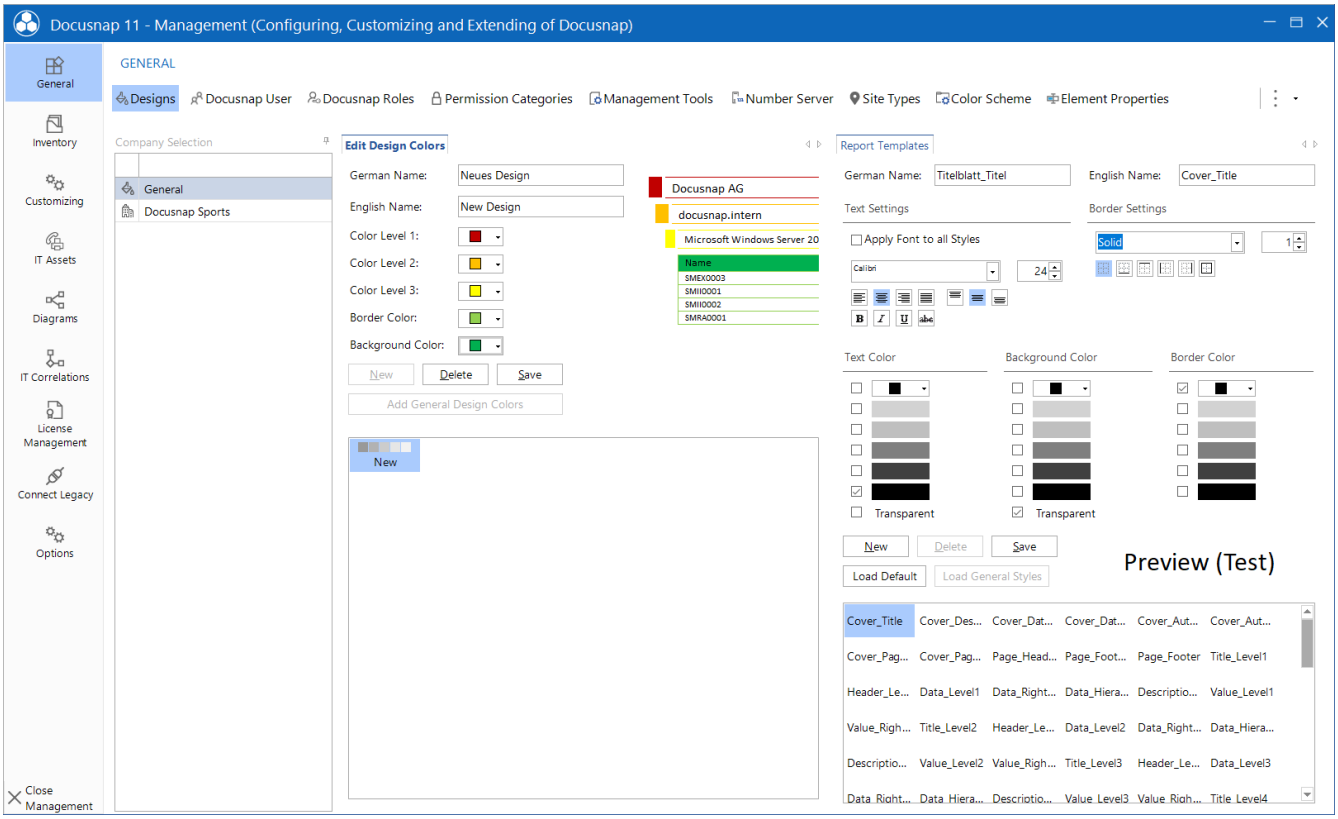

Figure 8 - Creating custom color designs

5.2 CUSTOMIZATION OF THE FORMAT TEMPLATES

In the Design section, which was described in the previous chapter, you can also customize the report styles.

In this area you can, for example, adjust the font used within the reports. Select any style - customize the font and enable the **Apply font to all styles** option.

The New button is used to create a new style sheet. After a name has been assigned for German and English, the format template can be saved and then the formatting can be defined.

5.3 IGNORE MASTERREPORT TEMPLATE

If it is desired to do without the master report template for certain reports, e.g. no cover page is displayed and the report can be exported to Excel, this must be stored in the report itself. To do this, open the report you require. Open the Report Designer from the pull-down menu Reports.

In order not to use the Master Report Template on this specific report, it is sufficient to adjust the margins. The default limits for the margins are

- Left-aligned 20
- Right 10
- Top 10
- Bottom 10

If one of these values is adjusted, the master report template is no longer applied.

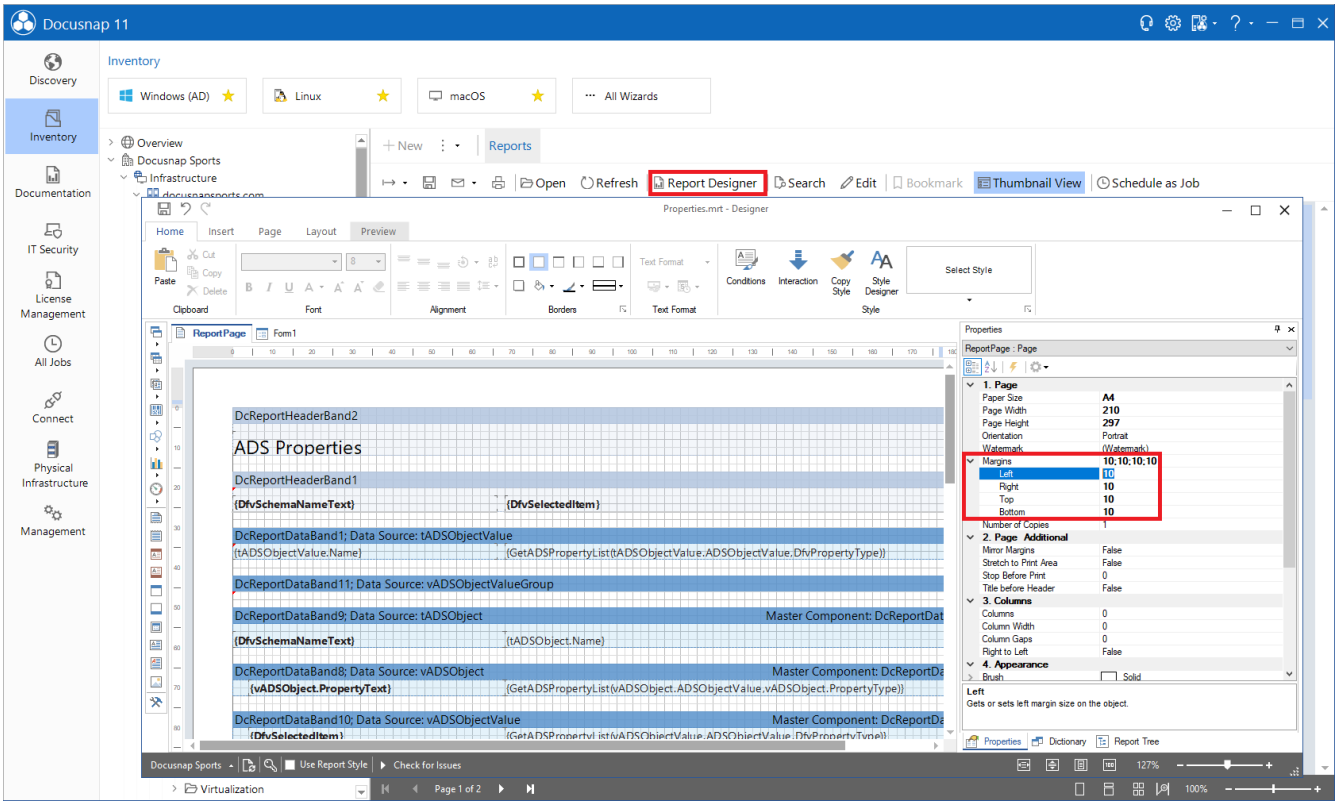

Figure 9 - Changing the default values

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VERSION HISTORY

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