Reports

Customize the logos and designs of reports

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AUTHOR	Docusnap Consulting
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1. INTRODUCTION

In order 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 template. So if you want to make an adjustment to the header and footer, e.g. adjust the logo, this is done centrally in the master 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.

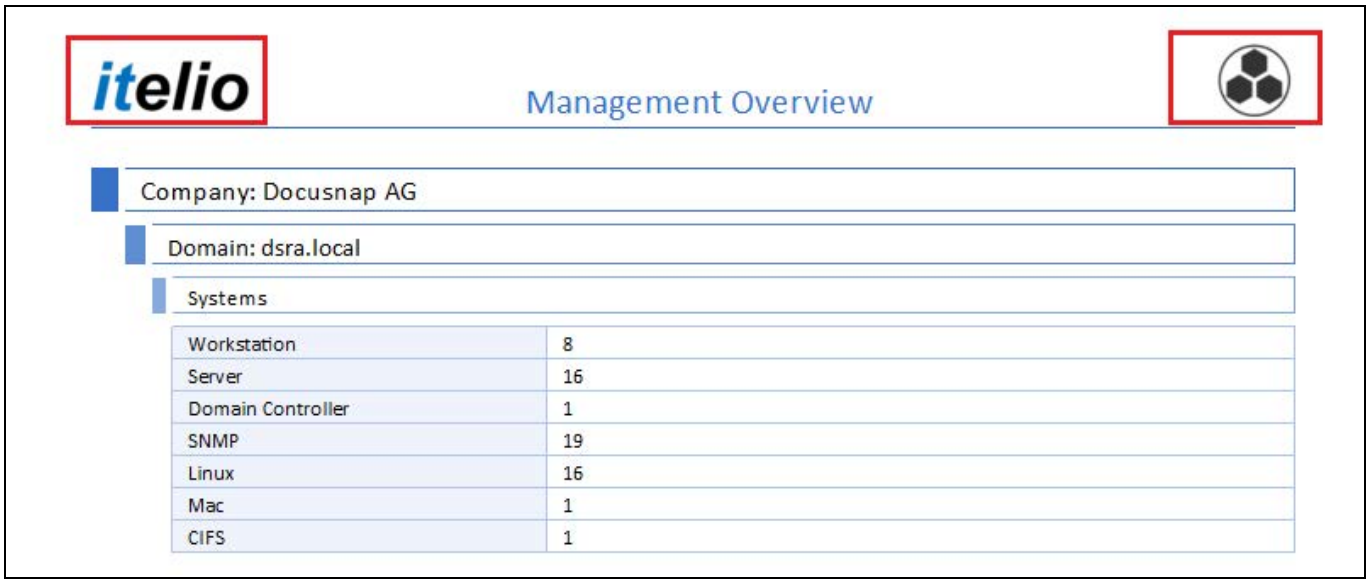

Figure 1 - Logos in the header

The Documents - Layout (CI) tab allows you to open the context menu for customizations. The drop-down menu lists the following selection:

- General

In the General section you can customize the logo, which can be found in the upper left corner of the header.

- Name of your client

When selecting your company or the name of the company for which you use Docusnap, it is possible to customize the right logo within the header. You can also select a specific design for this company.

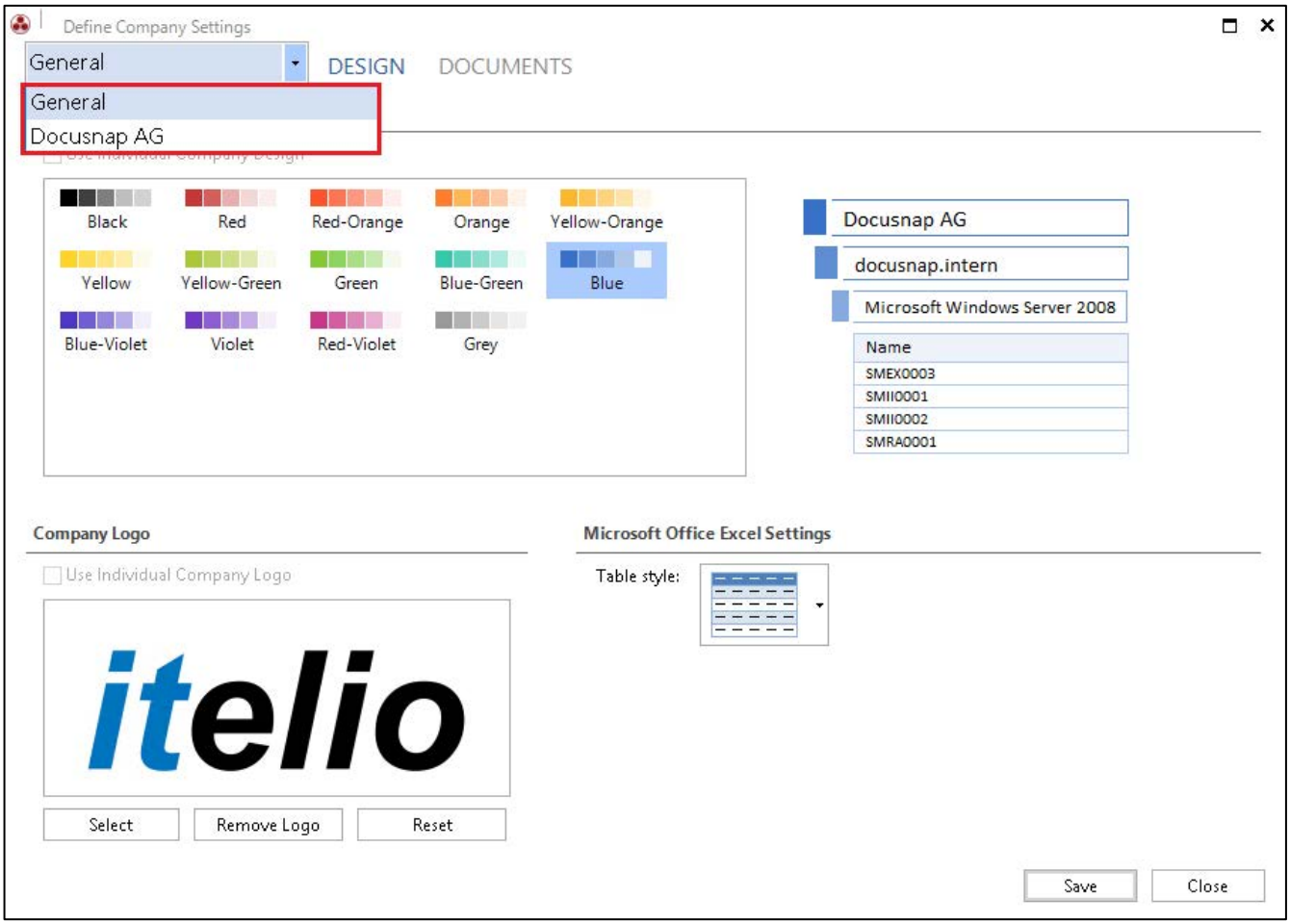

Figure 2 - General and Client context menu

In the lower section you will find the buttons:

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

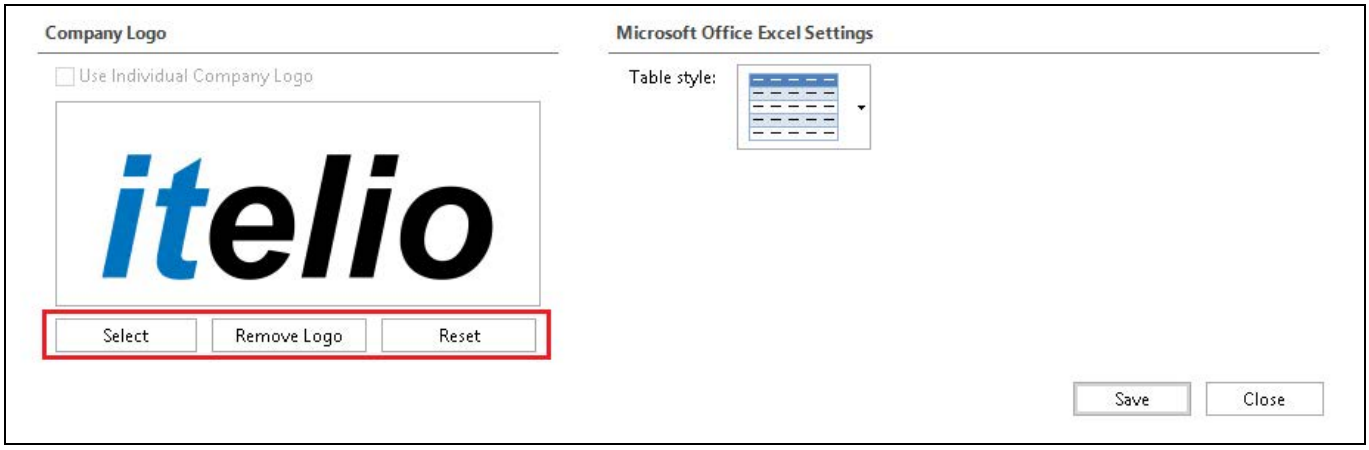

Figure 3 - Buttons for editing the logo

3.1.2 ADAPTATION OF THE DESIGN

In addition to the logos, individual colour schemes can 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 - chapter 4.1 Creating your own designs.

In the context menu **Documents - Layout (CI) - Design**, you will find the color schemes. By selecting and then saving the desired theme, it is applied to all reports.

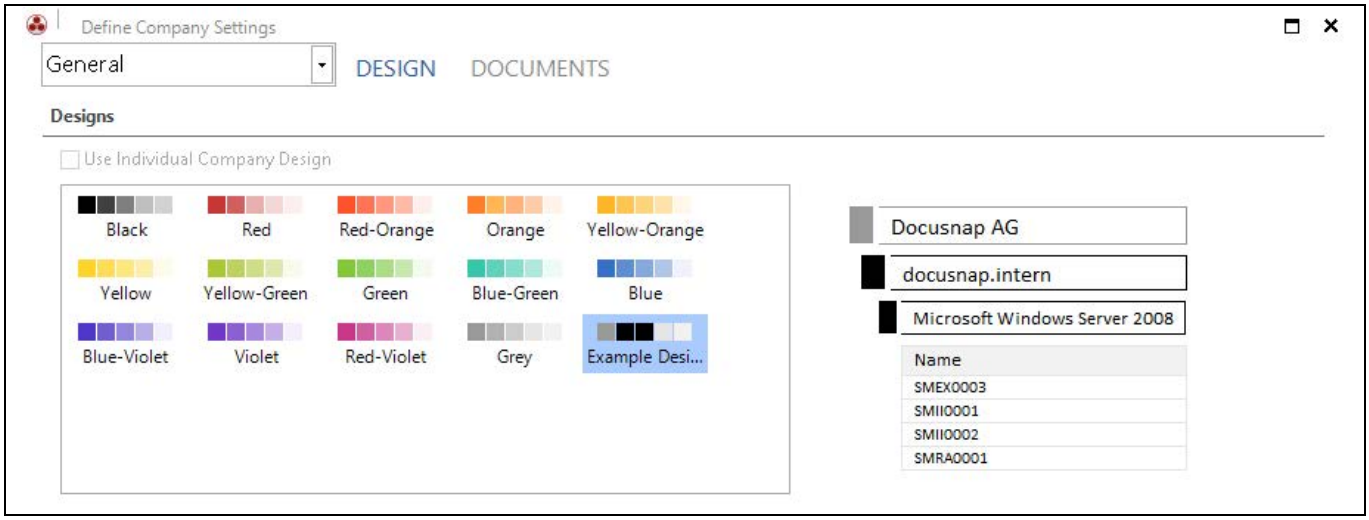

Figure4 - Selecting specific color designs

3.1.3 REPORT DISPLAY OPTIONS

The **Documents - Report Display Options** context menu allows you to omit certain options so that they are hidden in the reports. These changes are applied to all reports below the respective client, if the status setting is set to **Individual settings**. By checking or unchecking the box, the changes become effective. The following options are available for selection:

- Show cover page
- Show header line
- Show footer

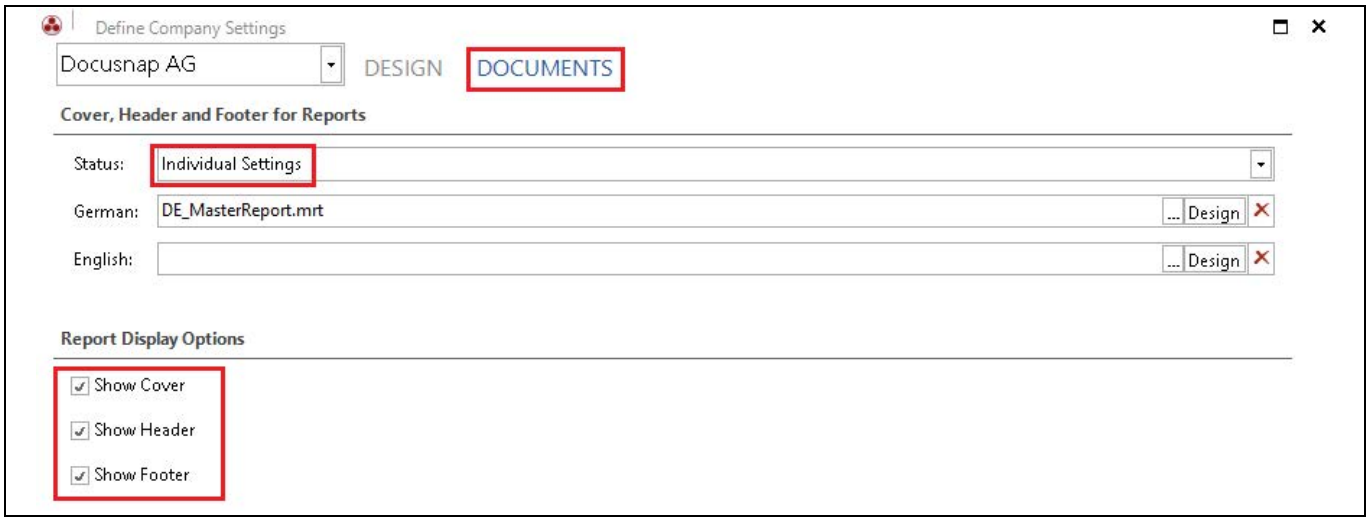

Figure5 - Report display options

3.1.4 SET UP REPORT PAGE

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

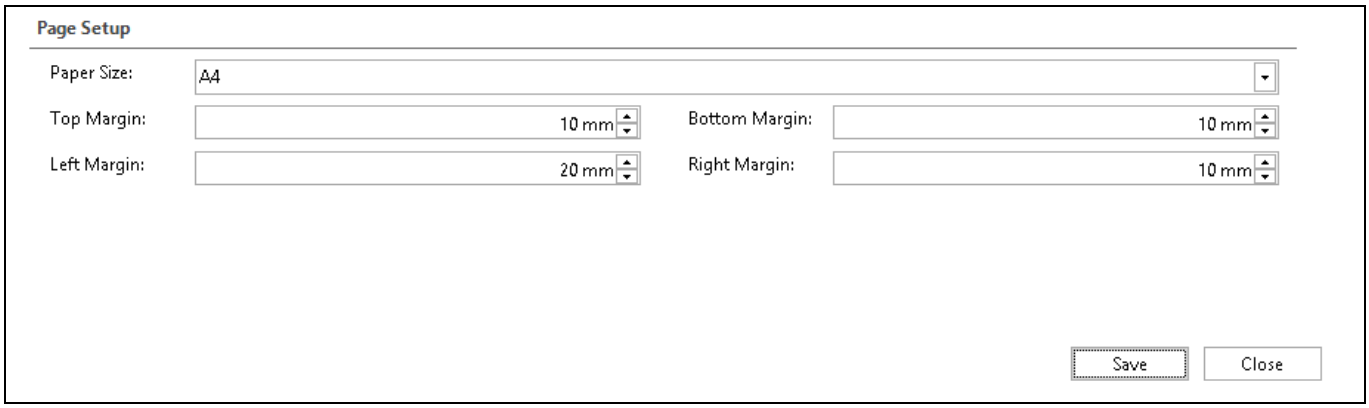

Figure6 - Report Page Setup

3.2 MAKING ADVANCED ADJUSTMENTS

3.2.1 CUSTOMIZE THE COVER PAGE

In the standard system, the cover page of a report contains information such as the date, author and number of pages. These are defined as variables. If it is desired to design the cover page differently, it can be replaced by any other variable by double-clicking on the respective variable. In addition, a static text can also be stored as author. A static content can be defined using the **Expression** context menu.

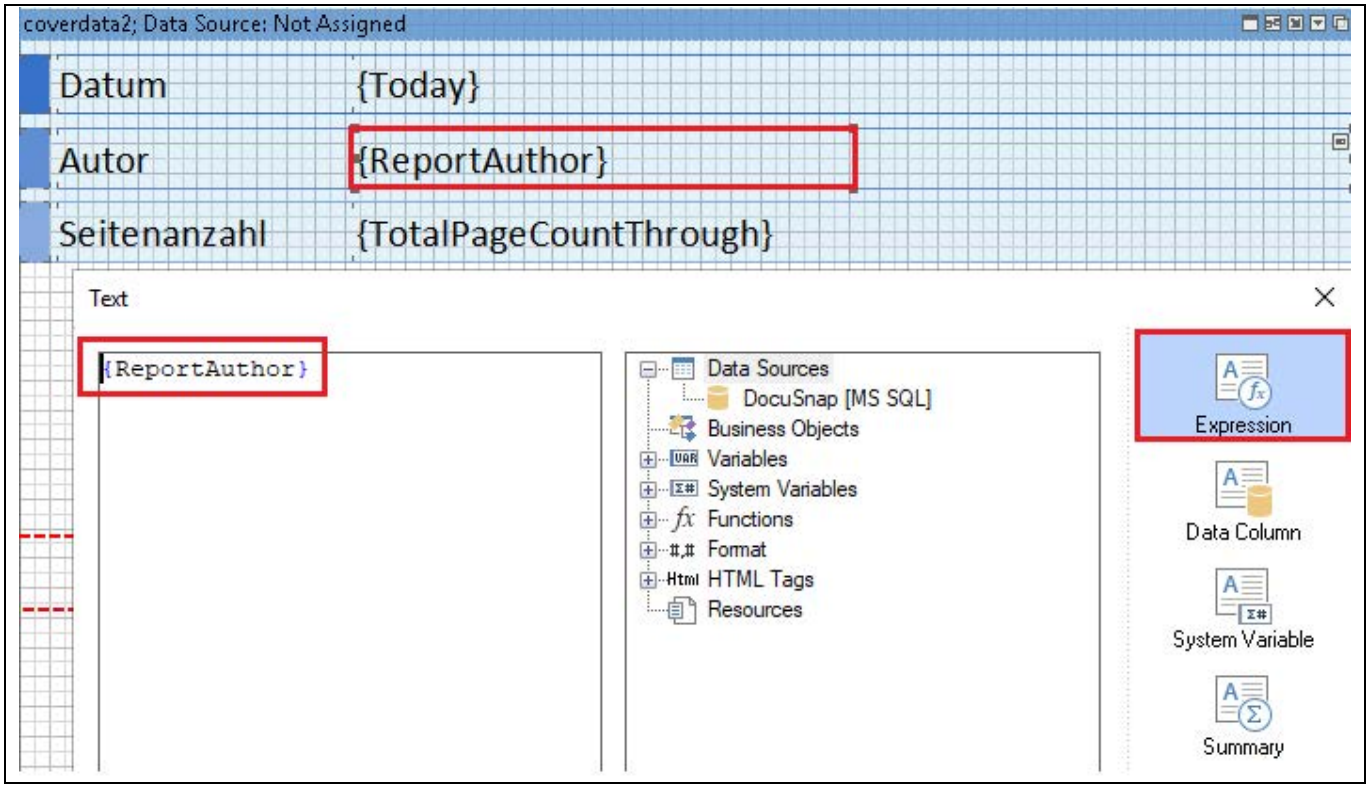

Figure7 - Author row

3.2.2 REMOVE THE DOCUSNAP LOGOS

In the standard version, the Docusnap logo can be seen on the cover page as well as in the header and footer. If it is desired to hide it, this change must be made directly via the master template.

To do this, open the Master Report - **Documents - Layout (CI) - Documents - Language - Design.**

Using the different tabs (**Cover**, **Header** and **Footer**) you will find the Docusnap logo on the respective section. The logo can be activated or deactivated with a right click. After saving, the change is applied to the reports.

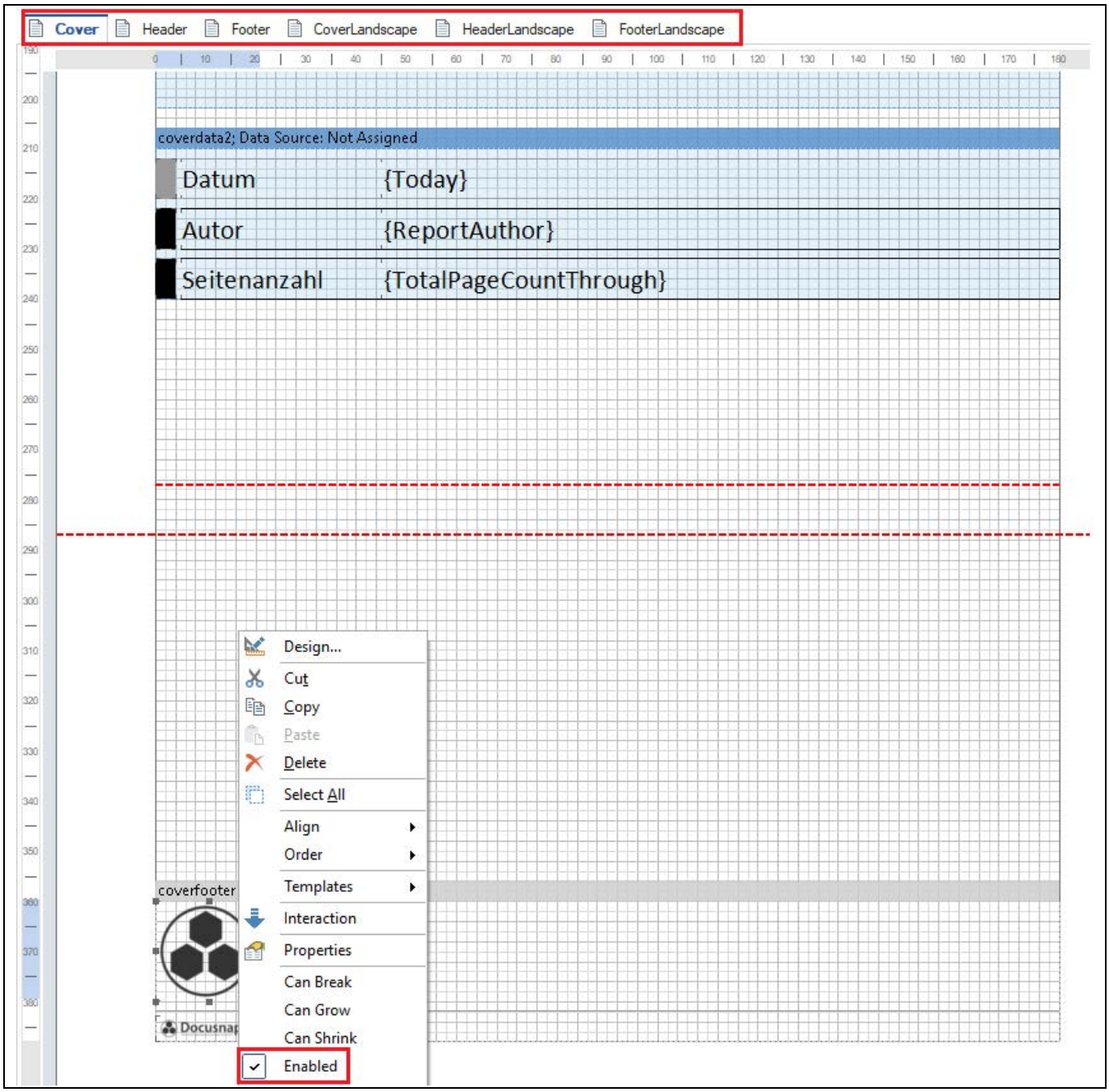

Figure8 - Removing the Docusnap logos

4. FURTHER TOPICS

4.1 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 below **General**. After selecting General, you can select the colors for the layers, borders and column labels in the **Edit Design Colors** area.

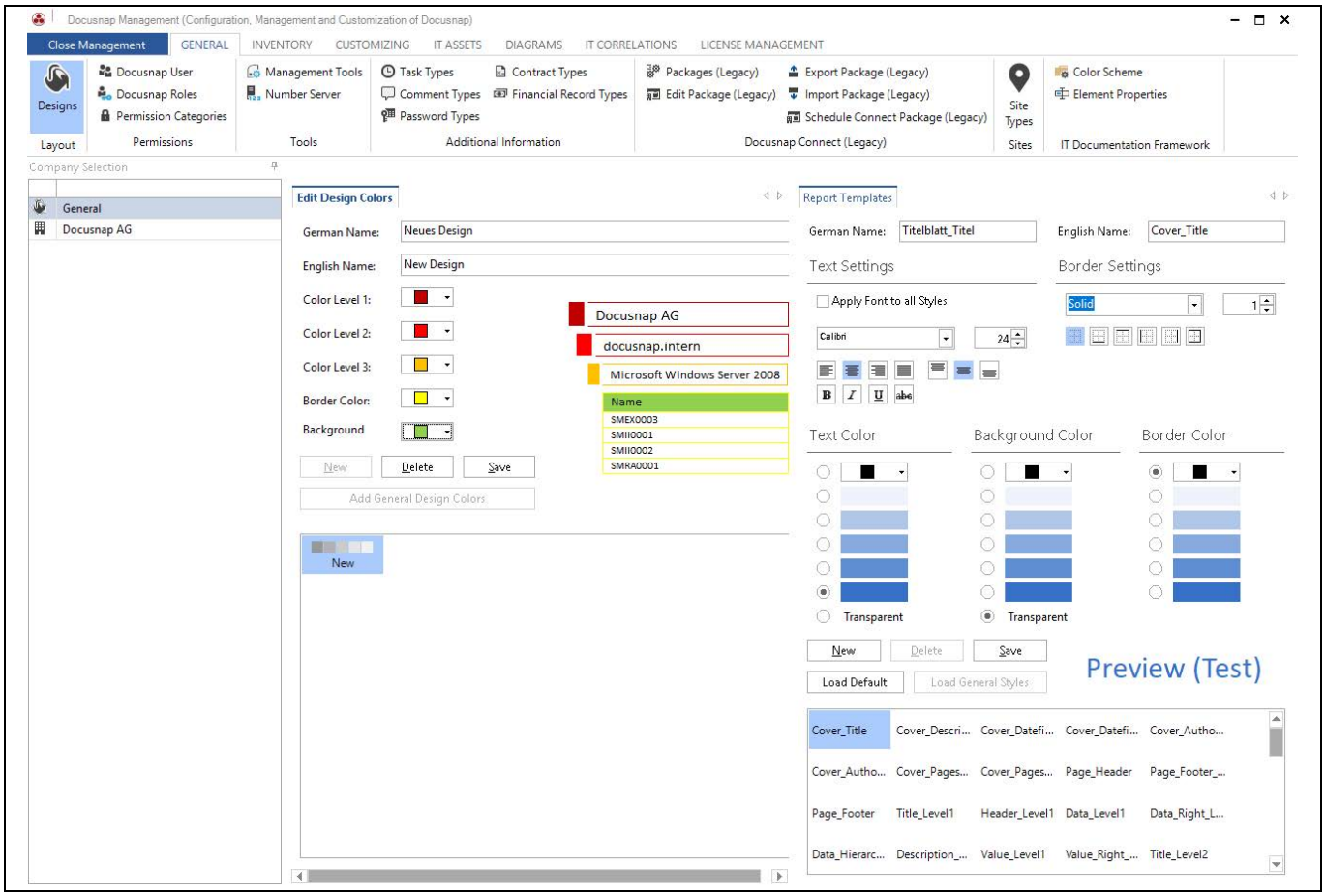

Figure9 - Creating custom color designs

4.2 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.

4.3 IGNORE MASTERREPORT TEMPLATE

If it is desired to do without the master template for **certain** reports, e.g. no cover sheet 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 want to use. Open the **Report Designer** from the **Reporting tab**.

In order not to use the Master Report template on this specific report, it is sufficient to adjust the margins. The standard 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.

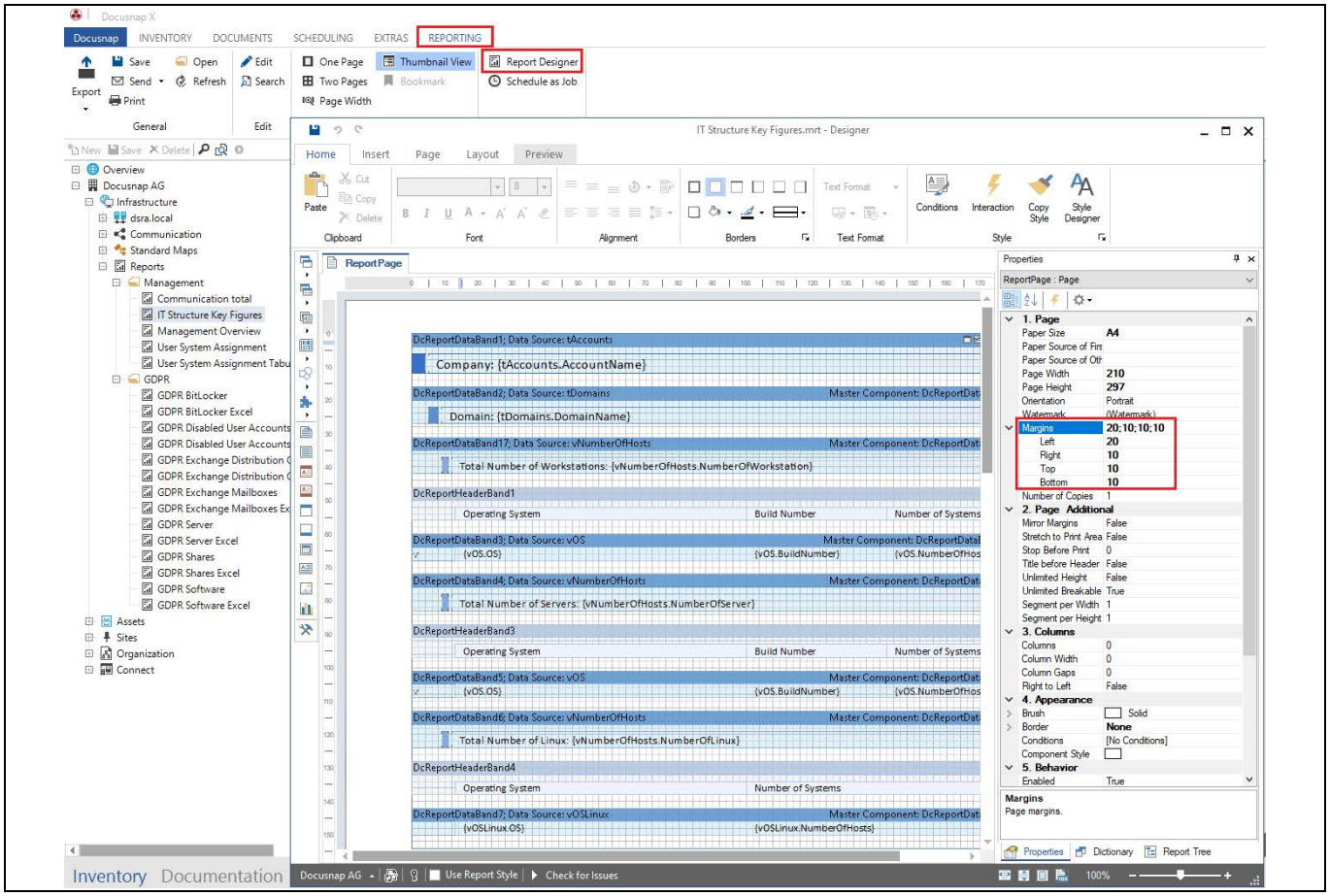

Figure 10 - Changing the default values

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