Desktop Studio: Report Templates

Intellicus Enterprise Reporting and BI Platform

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Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: http://www.intellicus.com/acknowledgements.htm .

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Working with Design Templates

All the reports designed for an organization may need uniform appearance. For example,

- All of them may need to have company logo or a watermark

- Specific formatting for text in column titles and report rows (detail section)

- Page numbers in a specific way,

- Contact address of the company at the bottom, etc.

To have the same formatting for one hundred reports, you as a designer would need to actually set the reporting on each control placed on all the one hundred reports. To save this time, and reduce chances of errors, Intellicus offers feature of templates. All you need to do is, create a template and apply that template to the reports.

When you design a report layout with Report Wizard, you might have noticed **Apply Template** dropdown box on the **Style** tab.
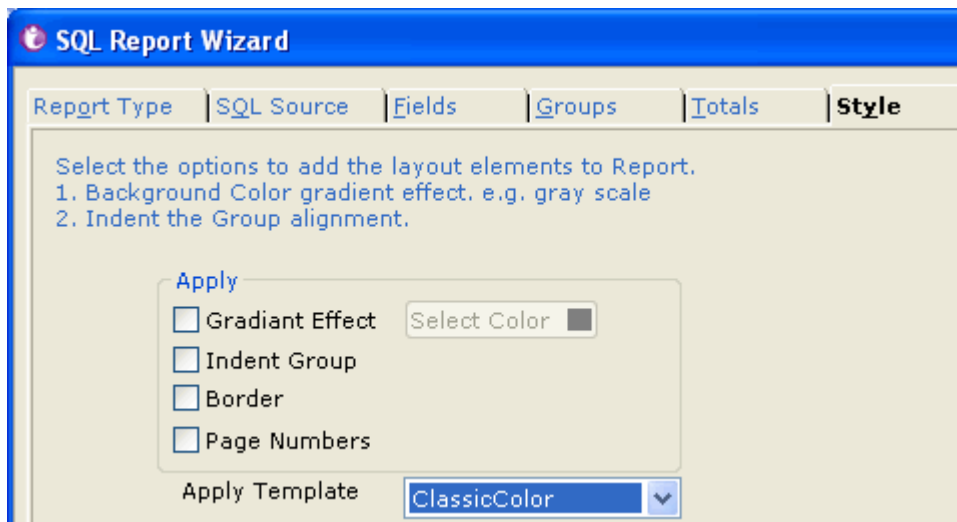
Figure 1: Apply Template on Report Wizard

The options that appear in the **Apply Template** dropdown box are the template files that are installed while you install Intellicus. You can use any of the template files for applying on the report.

Using Studio, you can also design your own templates. A template that you have designed will appear in the **Apply Template** dropdown box. This in turn, you can use with any of the report that you design.

Template files have extension '.irt' and can be opened in Studio for modification.

How does it work

When a template is used while creating a report layout (.irl file), studio picks up some of the information from the template.

Template files have two types of controls:

- **Dynamic Controls:** These controls transfer some of the properties to the actual controls placed on .irl file. The properties that will be transferred will depend on the type of control and section where the control is placed. For example, on expense statement, formatting of departmental expense summary, etc.

- **Static Controls:** These controls are copied as it is from .irt file and placed on .irl file. For example, text controls like copyright messages, graphical objects like line and box, etc.

In addition to the above, a template also inherits a set of report level properties to the irl:

- **Report Properties:** PrintWidth, DocumentName, ScriptLanguage.

- **Watermark   properties:**   Watermark,   WartermarkAlignment, WatermarkPrintOnPages.

- **Page   Setting   properties:**   LeftMargin,   RightMargin,   TopMargin, MirrorMargins, PaperSize, PaperHeight, PaperWidth, Orientation, Collate, Duplex, Gutter, PaperBin.

Control-names of dynamic controls are reserved to irt files. Names of all type of controls start with letters IRT_ .

Controls by sections (dynamic controls)

Intellicus studio offers number of controls that can be used in respective sections in report template. Properties from these controls will be automatically applied to the actual controls in the report layout file.

Report Header

IRT_ReportHeader_Title

Use this control to specify standard formatting and placement (top offset from start of the section) for Report title that is placed on Report Header.

Page Header

IRT_PageHeader_Label

Use this control to specify standard formatting and placement (top offset from start of the section) for Page Header.

IRT_PageNo

Use this control to specify standard formatting and placement (top offset from start of the section) for page number in page header section.

Group Header

IRT_GroupHeaderX_TextBox

Use this control to specify standard formatting and placement for textbox placed in respective group header. As far as templates are concerned, studio supports up to 5 groups.   Control for group header of group level 2 will be IRT_GroupHeader2_TextBox and likewise.

Detail section

IRT_Detail_TextBox

Use this control to specify standard formatting and placement (top offset from start of the section) for textbox type of controls placed in detail section.
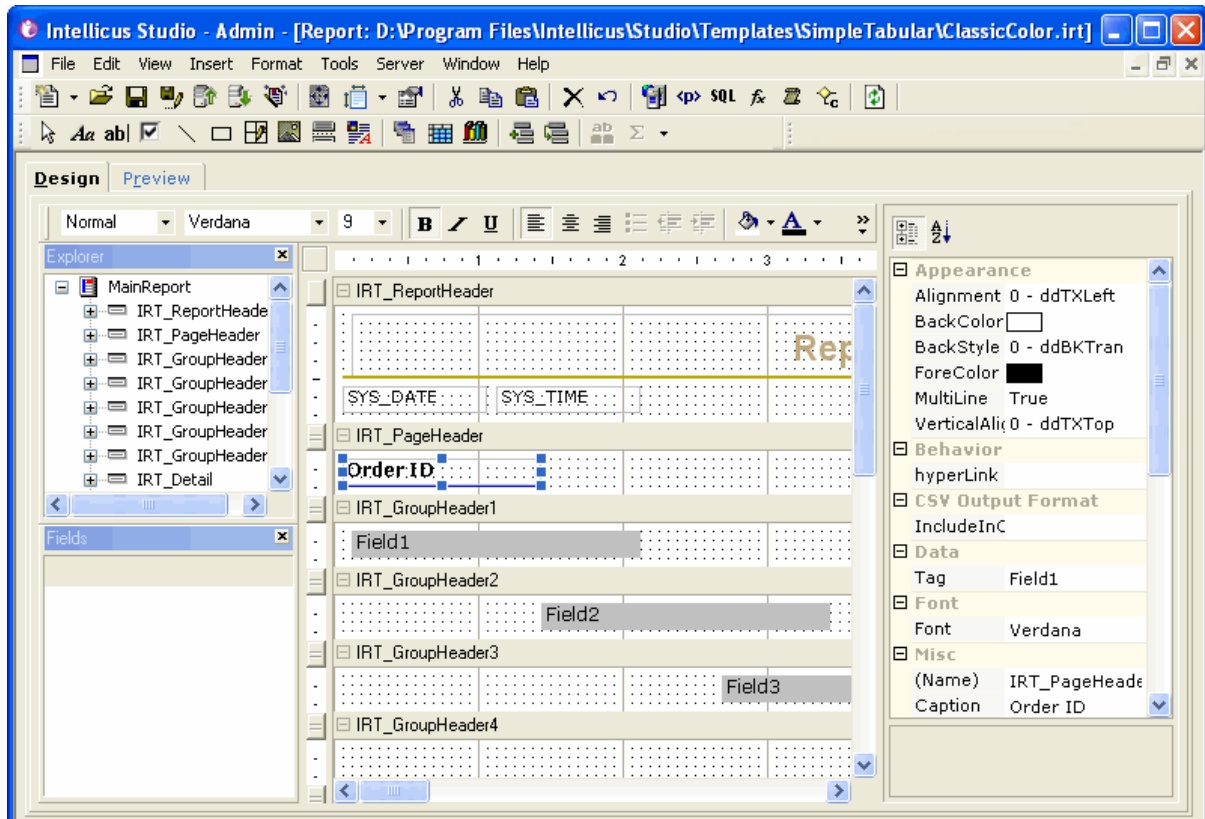

Figure 2: A template opened in Studio

IRT_Detail_Date

Use this control to specify standard formatting and placement (top offset from start of the section) for date type controls placed in detail section.

IRT_Detail_Number

Use this control to specify standard formatting and placement (top offset from start of the section) for number type controls placed in detail section.

Group Footer

IRT_GroupFooterX_Summary

Use this control to specify standard formatting and placement (top offset from start of the section) for textbox placed in respective group footer. The control will be placed below the field that is being totaled. As far as templates are concerned, studio supports up to 5 groups. Control for group footer of group level 2 will be IRT_GroupHeader2_Summary and likewise.

Page Footer

IRT_PageNo

Use this control to specify standard formatting and placement (top offset from start of the section) for page number in page footer section.

Report Footer

IRT_ReportFooter_Label

Use this control to specify standard formatting and placement (top offset from start of the section) for Report Footer.

Examples of dynamic controls

Having a page number in Page footer

In report template, place the control **IRT_PageNo** and apply the formatting you want to apply on it.

Having group headers and group footers

In report template, create two groups. In outer group header (group header 2) place control **IRT_GroupHeader2_TextBox**. In inner group header (group header 1) place control **IRT_GroupHeader2_TextBox**.

Having summary in the group footer and page number in page footer

In report template create a group. In group footer, place the control **IRT_GroupFooter1_Summary**. In page footer, place the control **IRT_PageNo**.

About Static Controls

A static control can be placed anywhere on the report template. It will be exactly copied to the report layout (irl file) from respective template (irt file). Static controls are generally text controls like copyright message, or graphic controls like line, box or picture.

Names of these controls are prefixed with **IRT_**.

Examples of static controls

The examples given below are some of the practical uses of static controls:

- A line in report header section below the report header. Name can be **IRT_Ln.**
- An image on Report Header, a copyright or disclaimer or address information in the report footer. Names can be **IRT_logo**, **IRT_cpright**, **IRT_co_addrs**.
- A box (around a checkbox) in detail section. Name can be **IRT_Bx**.
- Oval or box shapes for OCR forms. **IRT_Ovl**.

Working with Templates

To design a new report template, you can:

- Design a template and save as .irt file.

- Open an existing template, make changes, rename and save it.

To create a new template

1. In Studio click the **New** button from the toolbar.
2. Click the **Blank Report** button on Wizard. If you have just launched Studio and you get the **Welcome** dialog box, uncheck **Use Wizard** checkbox and click **Ok**.
3. Work with the template creation.
4. To save the template, click **Save As** button to get the **Save As** dialog box.
5. Choose location as <Folder path>\Intellicus\Studio\Templates\SimpleTabular.
6. Save the file as type .irt.
7. Click the **Save** button.

The process of creating a template is the same as that of creating a report layout. This may involve,

- Adding sections

- Placing dynamic controls and static controls on different sections of the template

- Setting properties of controls, including other activities.

To open a template

Template files are stored at folder path:

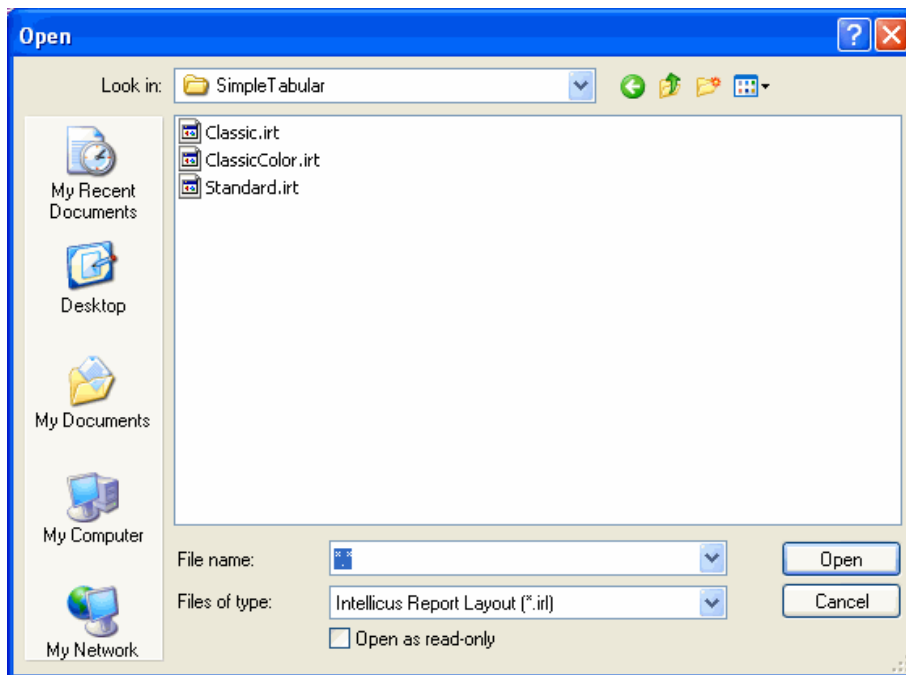<Folder path>\Intellicus\Studio\Templates\SimpleTabular.

Figure 3: Opening a template file

1. From the **File** menu, click **Open**.   The **Open** dialog box appears.
2. In the **File Name** text box, specify "*.irt" to get a list of template files available in the active folder.
3. Browse the folder where template files are stored.   Default folder is <Folder path>\Intellicus\Studio\Templates\SimpleTabular.
4. From the list, select the file on which you want to work and click **Open**. The dialog box disappears and the file opens in Studio.

Important notes about usage of template

Here are some important notes about usage of templates.

- Template can be applied to a report only through Wizard.

- In case the wizard is reloaded and a few fields are added, a new group is formed, etc, the new controls, sections will net inherit the effect of the template, until the template is reapplied.

- In case the wizard is reloaded and a new template is applied, static controls placed on the report based on previously applied template will continue to remain. New effects will be available based on new template. The dynamic controls will have effects based on new controls.