



PROJEQTOR
TEMPLATE REPORT

TECHNICAL DOCUMENTATION

VERSION: V 3.0

REFERENCE: PLUGIN – TEMPLATE REPORT

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INTRODUCTION

The objective of this document is to explain how to use the plug-in " Template Report ".
 With this plug-in you can replace default edition of detail of an item or list of items with a customized one from a template file in various formats (docx, xlsx, pptx, html, txt, odt, ods, odp).

SETUP

When acquiring a plugin, you get a .zip file.
 To install it, go to the Plugins Management screen.

Plug-ins

▼ installed plug-ins

	name	description	version	deployed date	deployed on	compatible since
	screenCustomization	Customization of screens	V6.0	02/01/2022	V9.4.2	V9.2.2
	translationApplication	TranslationApplication	V1.6	06/22/2019	V8.0.4	V6.5.0

▼ available plugins (local)
 plug-ins (zip files) are searched in directory '/plugin'

no plugin available

add local plugin file

▼ available plugins (remote)
feature not available on this version

In the section of installed plugins, you have the list of plugins already in place with the version of the latter and on which version of ProjeQtOr you installed it. Compatibility information is given.

▼ available plugins (local)
 plug-ins (zip files) are searched in directory '/plugin'

	file	date	size
	templateReport_V3.0.zip	02/08/2022	1.6 MB

add local plugin file

In the available plugins section, click on the browse button to retrieve your .zip file.

Once the file is uploaded, it appears in a table.

Click on to install your plugin

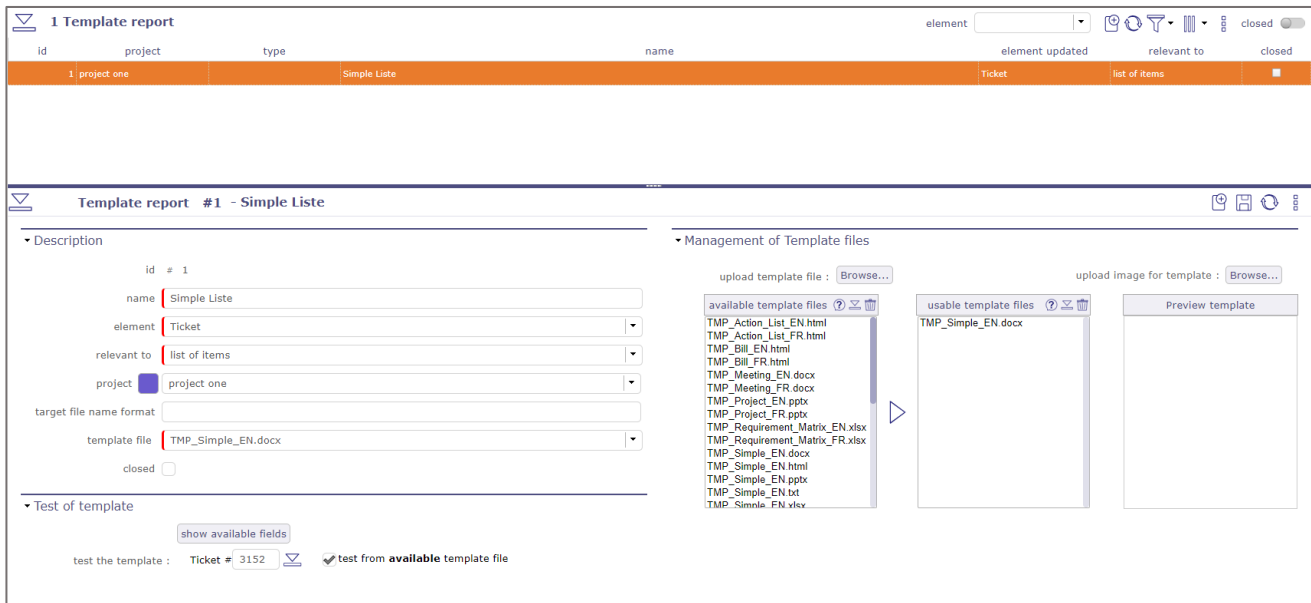
Click on to view the plugin metadata.

Click on to cancel the installation of this plugin.

When the zip is installed, the application restarts. Go to the Plugin menu to access it.

REPLACE DEFAULT EDITION WITH TEMPLATE

When plugin is installed, you get a new screen “Template Report”:



DESCRIPTION

On this part of the screen, you can define new template usage:

- **id:** id of the template definition
- **name:** name for the template definition

it will help you select the template if you define several for the same class

- **element:** the class of the element the template will be used for relevant to select if template will be used for “list” or for “detail”
- **type:** the type of the element, to restrict use for this type.

not available if template is relevant to “list”

- **project:** the project to restrict use for this project

not available if template is relevant to “list”

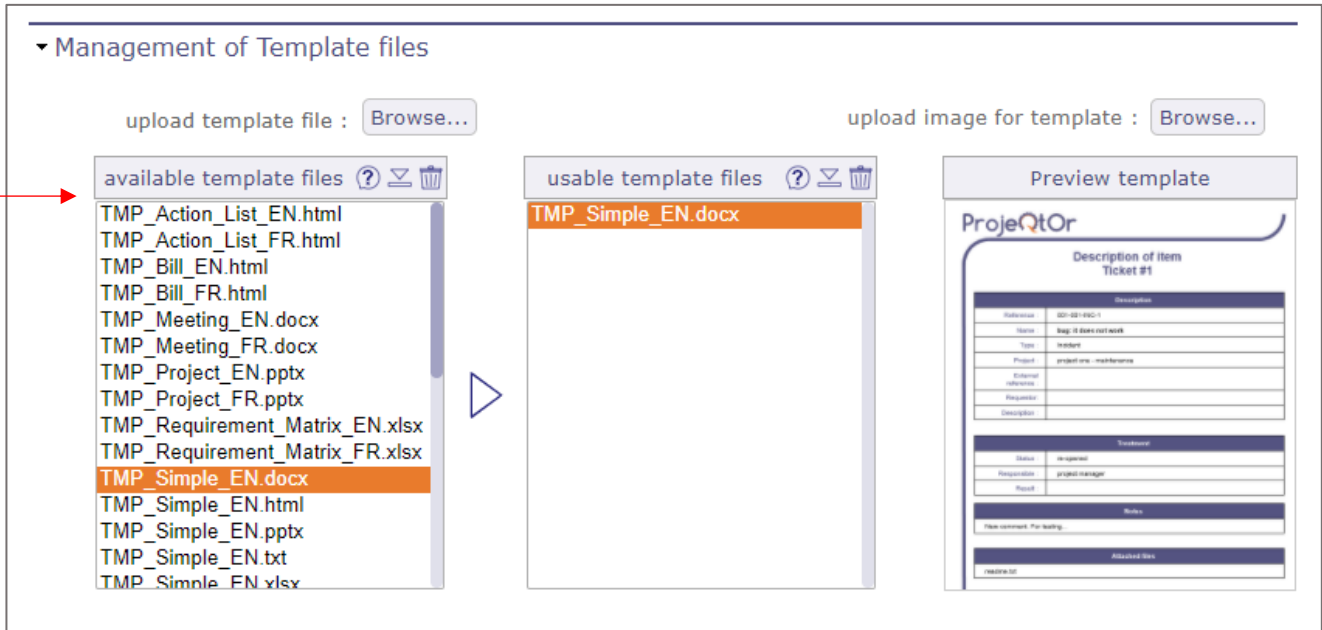
- template file template file to use (select from “usable” templates)

MANAGEMENT OF TEMPLATE FILES

On section “management of template files” you can define the “available” and “usable” templates.

AVAILABLE TEMPLATE FILES

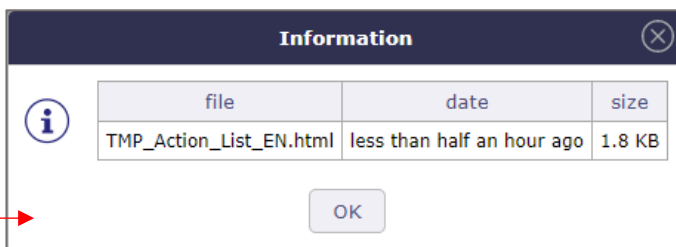
The available template files list all templates that are stored in template library. Several templates are provided with the plugin to help you understand how it works. You can use the browse button to add a new template to the template library.



Click on to display the creation date and the size of the document

Click on to download and edit the selected document

Click on to delete the document of the list and the plugin folder



USABLE TEMPLATE FILES

Usable template files list all template files that can be used. When using template, only the template files present in this list will be visible and usable.

Select a template file from the "available template files" list and click on to add a template file to the list. This will make a copy of the "available" library into the "usable" library.

PREVIEW TEMPLATE

The "Template preview" section, displays an image of the selected template file in "available template files". Click on the browse button to upload the image of your file.

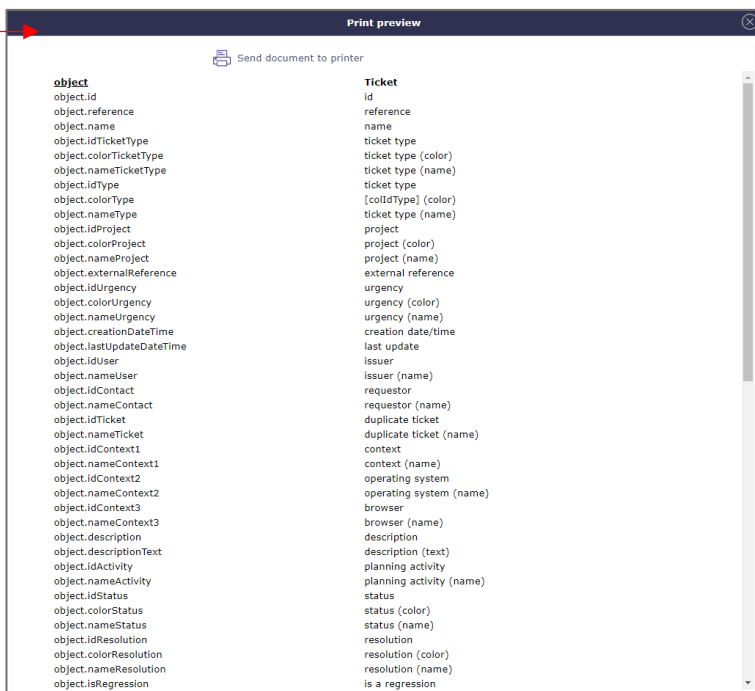
TEST OF TEMPLATE

On section "Test of template" you can test your template file and get the resulting file.

▼ Test of template

show available fields

test the template : Ticket # 3152  test from available template file



You can use the button "show available fields" to list all fields you can use on template file for the select item class (here the fields for the tickets).

You can use the button  to test the template for a dedicated item.

For test template on "detail", first select id of the item you want to use for result.

This is not mandatory for template on "list" (first 10 items will be used for the test)

You can use last checkbox to test from "available template" (in the library) rather than using "usable template". This will allow you to upload new version (in available library) and test it while users still use previous version (in usable library).

TEMPLATE REPORT PER PROJECT

The “template report” plugin provides two forms: the first one, “template reports” is describe above. The second is “template reports per project”. It is exactly the same with but “project” is mandatory. By default, the first one is available to “administrators” and the second one to “Project Leaders”.

Note that for template on list, if you limit template definition to a project, template will be proposed only if corresponding project is selected in the project selector.

TEMPLATE STRUCTURE

Template file can be any of the following file types:

- .docx: Word document
- .xlsx: Excel sheet
- .pptx: Power Point presentation
- .txt: Plain text file
- .html: Standard html page
- .odt: Open Office text document
- .ods: Open Office calc sheet
- .odp: Open Office presentation

On these templates’ files, you can use any formatting, with headers, images, tables, and so on. You just have to place fields in the document with the following syntax:

[object.fieldName]

Examples:

[object.name]	>	the name of the item
[object.idProject]	>	the id of the project of the item
[object.nameProject]	>	the name of the project of the item
[object.description]	>	the description of the item

You can also include information displayed in tables, representing a one-to-many link, like Notes, Links, Attachments, ... For this, you need to insert fields in cells of a table.

First cell must contain the name of the block and how block lines are managed:

`[blockname.fieldName;block=tbs:row]`

or

`[blockname.fieldName;block=tr]` (for html formatting)

Examples:

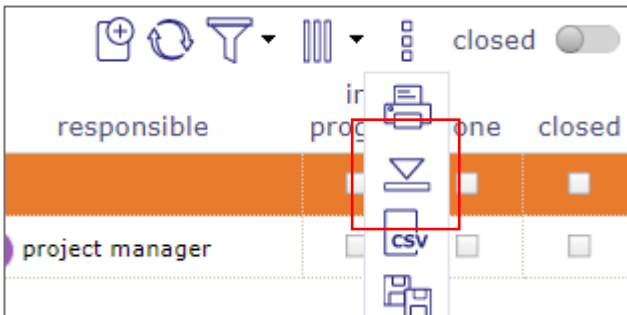
`[note.noteText;block=tbs:row]` > **the notes of the item**


If block “link” is available, all blocks “link_class” will list same fields but with list of links limited to corresponding item class. In addition to “standard fields”, you can also use extra fields that will ease management of templates:

- **[object.nameClass]**
For each field corresponding on a screen to a list, the field is called “idClass” (where “Class” refers to the class of referenced item) and contains the id of the referenced element. Then “nameClass” is also provided and contains the name of the referenced item.
- **[object.textField]**
For fields corresponding to large formatted text (like “description” or “result”) in addition to field “field” you can also use “textField” that contains not formatted text (text without html tags)
- **[link.refName]**
For blocks referencing other items, you will find reference as “refType” (class of reference item) and “refId” (id of referenced item). The field “refName” is then also provided, containing name of the referenced item.

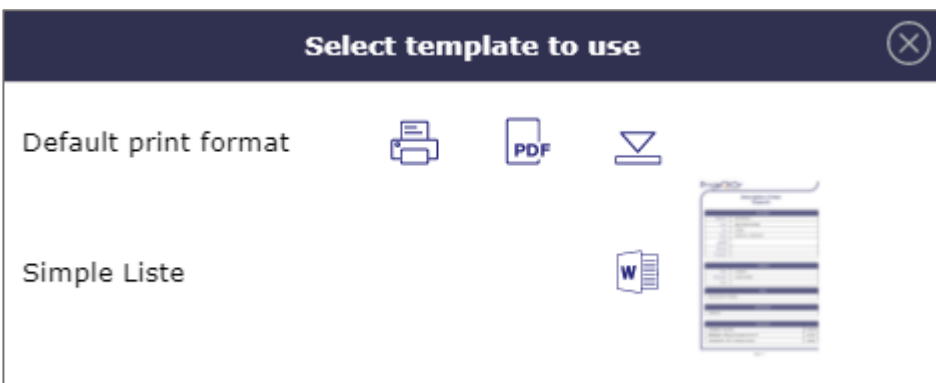
When writing codes for fields, take care to have no format change between the brackets, nor spaces between characters. For instance `[object.nameProject]` will not be replaced by corresponding project name because of internal formatting (italic, font size). On some editors (Word for instance) you may need to disactivated automatic corrections while typing as it may add some unexpected formatting (red underline).


USE TEMPLATE





When definition of template is done, on the item description or on the item list button to export to PDF is replaced by a download button .

Click on this button to retrieve the “templated” report file.



Click on  to print the list or detail areas on a printer.

Click on  to export the list or detail areas in pdf format.

Click on  to download the report template in the format and template you have chosen or created.

If you attached image to template file, it will be displayed (with size reduction) on right part.

You can then click on image to get full size view.

To go further

This plugin uses an open-source templating framework call “Tiny But Strong” (TBS), and its plugin “Open TBS” that manages formatted files. You can refer to the documentation of this very good framework to have an overview of possibilities of the template and syntax to be used on templates.

- <http://www.tinybutstrong.com/manual.php>
- <http://www.tinybutstrong.com/opentbs.php?doc>

LIMITS

This plugin has some limitations when generating result, depending on format. Be sure to understand and accept these limitations before buying the plugin.

- Word, Excel, PowerPoint formatting cannot export formatted text. Then long text fields such as “description” field, “result” field and “notes” won’t be able to format the html tags. If you use the normal field code [fieldName], you will get html tags displayed in result. You must use plain text field [fieldNameText].
- Only Html output format is able to display formatted text (for long text fields such as “description”, “result” and notes).
- On Html output format, if you download the html file, you will lose display of images (you’ll only see place reserved to the image). Images will be retrieved if you export result to PDF.
- Html page must stand on single file. Any include of CSS or JavaScript files will fail. All styling must be included in the file.
- Plain text format (.txt) can manage blocks for lines with tag [block=_], but then will need that the corresponding line must end with a “new line” character, so cannot be the last line of the file. This may be important if you wish to export files in CSV format: it will contain an empty line at the end of the result file.
- Export to xlsx file may have some difficulties with merged cells. Data will be correct, but possibly you’ll have to manually re-merge cells on result file.
- When defining template files for MS-Office format, be sure to disable the spell checker, as it may introduce unexpected characters in the text. This is very important with docx and pptx format.
- The templates included in the delivery are just examples that you can reuse. Take care that we don’t expect to maintain these templates. Also, take care that install of new version of the plugin will overwrite these files. So don’t update them directly. Copy the ones you want, rename them and update the renamed files (the files you use will be saved in “usable template files” library).
- PowerPoint (and other presentation) format is based on Slides, that are not pages. So lists may come out of the slide, it won’t generate a new slide as it would generate a new page with Word format.

CHANGE HISTORY

Feature	Version	Compatibility ProjeQtOr V°
Plug-in for pdf report customization	V2.0	
	V2.1	
Arrows are missing on Standard templates	V2.2	
Export to XLSX, fields with some accentuated characters are blank		
The "activityplanningelement.plannedEndDate" not usable on lists	V3.0	
Give possibility to format name of generated file		
Give opportunity to list all items of a project, not only those linked to it		
On Call for tenders add list submission of Tenders and list Evaluation criteria		
Format amounts with currency		
When project selector is changed, download icon is not refreshed		
Adapt to V9.0 and MySQL V8.0.20		
Add a code for the checklists		