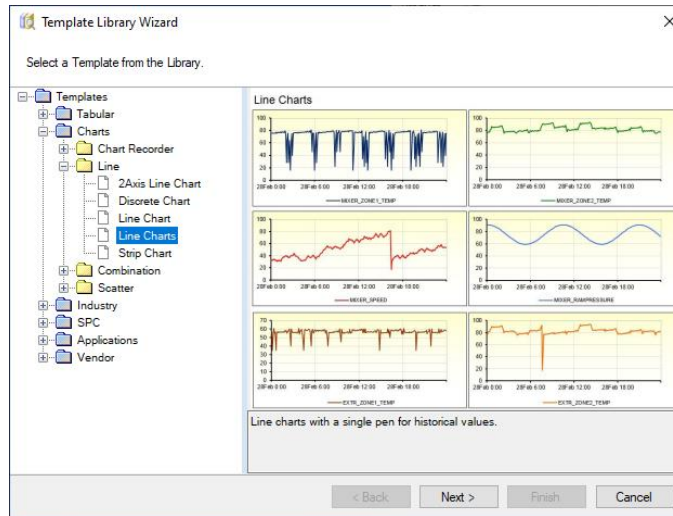# Template Library

## Overview

The **Template Library** is used to create fully report templates in a few easy steps.

To access, from the **Home** tab of the **Project Explorer**, select **Template**, **Library**.
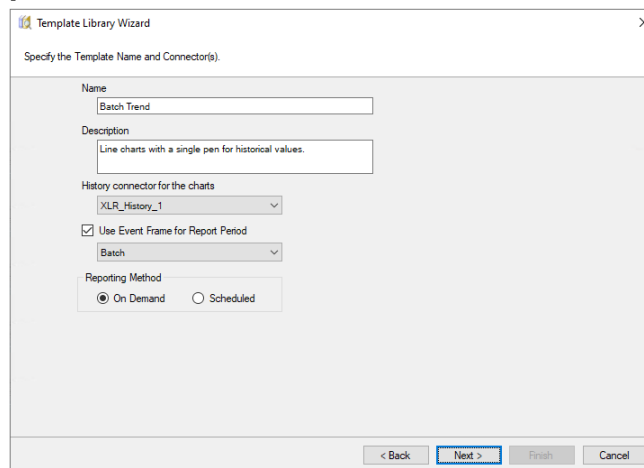
## Template Library Wizard

### Select a Template from the Library



The available library templates listed is based on the connectors configured in the current project. For example, if the project only contains a real time data connector, the library templates listed are those that only require a real time connector.

### Select the Template Name and Connector



Enter a **Name**, a **Description** and the **Connector(s)** used to access data.

If the library template is configured for a history connector and there are **Event Frames** used in the project, the **Use Event Frame for Report Period** is enabled. By checking, all the configured **Event Frames** in the project are listed. For more information on **Event Frames**, see the CONNECT, **Setup**

**Event Frames** in the document library.  For more information on using Event Frames with library templates, see the **Templates Using Event Frames** section below.

The **Reporting Method** determines if the template is to be used *On-Demand* or *Scheduled*.

## Customize the Content of the Template

The template may have a set of values that can be customized.  This can range from captions and labels in cells to the addition/removal of items.  For *Scheduled* templates, the tag names are specified.



Not all tag names need to be specified.

The next steps are only applicable to a **Reporting Method** of *Scheduled*.

## Setup Time Period

These settings define the overall **Period** of the report as well as the **Interval** used for the data spacing in the report.



Some templates may not allow all these settings to be modified.  In addition, the **Type** and **Interval** options may change depending on the nature of the template, the data connector source(s) or if an **Event Frame** is used for the **Time Period**.

## Setup Report Name

These settings define the **Report Names** for the template for the **WORKBOOK** and possibly **WORKSHEET**.
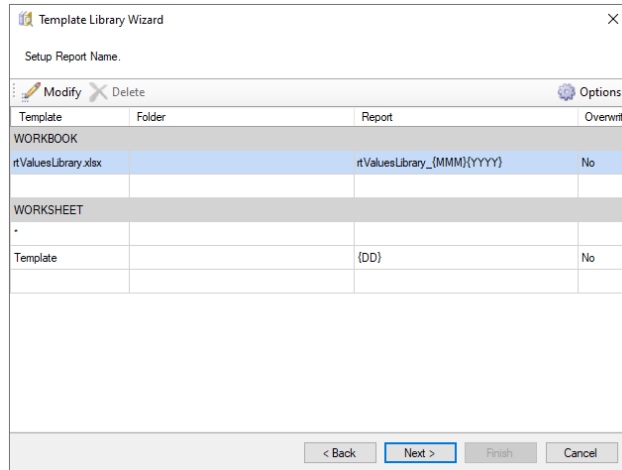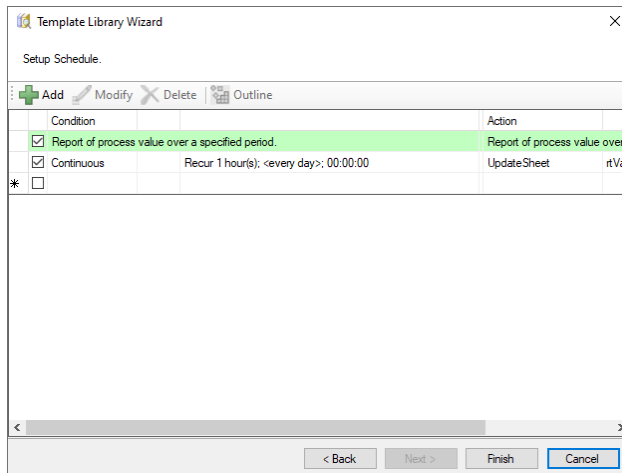


It is recommended to accept the default values.  Modifying the WORKBOOK setting to introduce a sub folder or changing the month from *{MMM}* to *{MMMM}* is perfectly acceptable.

For more information on **Report Names**, see DESIGN, **Template Studio** in the document library.

## Setup a Schedule

These settings define the schedule lines used to generate reports from the template.



For templates that are period on time the schedule is usually complete.  However, for templates based around process events, the schedule lines may contain keywords like *<StartEvent>*, *<ReportName>* or *<CollectEvent>*.  In these cases, the keywords must be replaced (typically with tags from the real time data source) before the template is finished.
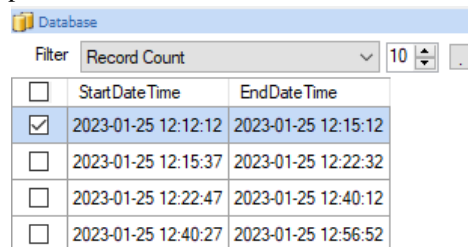
If additional publishing options are required like publishing to PDF or emailing a completed report, these actions can be added to the schedule before clicking **Finish**.

For more information on scheduling, see REPORT, **Deploy Schedule Reports** in the document library.

# Templates Using Event Frames

## On-Demand

If the **Use Event Frame for Report Period** option is checked for an **On-Demand** template, the template is deployed with a list of event frames. A selection in the list causes the start/end dates to be the Period of the generated report.
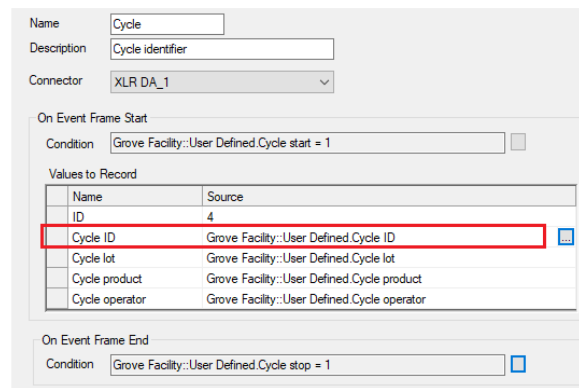


The list of event frames is presented in the **Database Panel**.

## Event Frame Definition

An **Event Fram**e is defined using the Event Frame designer.  An example configuration is as follows:
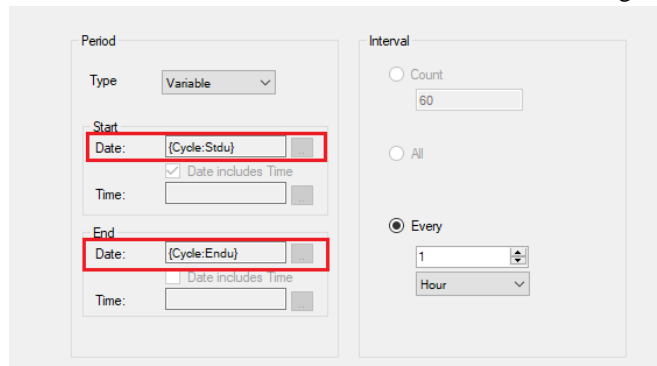


In the above, the **Name** *Cycle* is used in various places in the template.

## Scheduled

If the **Use Event Frame for Report Period** option is checked for a **Scheduled** template, the **Period** is configured to use the start and end date/time of the selected event frame. Using the example above:



The fields **Stdu** and **Endu** represent the start/end of the frame.

If the template is configured to be scheduled, the **Report Names WORKBOOK** is set up to use a variable which is given a value in the scheduler.

| Template | Folder | Report | Overwrite |
|---|---|---|---|
| **WORKBOOK** | | | |
| hdValuesLibrary.xlsx | {YYYY}\{MMM} | {hdValuesLibrary} | No |
| | | | |
| **WORKSHEET** | | | |
| . | | | |
| Template | | | |
| | | | |

The **Schedule** is set up to set that variable to the first value recorded for the template.

| Action | Set a Value to a Variable |
|---|---|
| Variable | hdValuesLibrary |
| Value | {Cycle:Cycle ID} |

The variable is assigned the value at the end of event frame.

The report is produced at the end of the event frame with a delay of 5 seconds to ensure the event frame information is complete.

Information in this document is subject to change without notice.  SmartSights, LLC assumes no responsibility for any errors or omissions that may be in this document.  No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the prior written permission of SmartSights, LLC.