

# PDF Exporter extension for Polarion ALM

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## 1 Preface

This document describes PDF Exporter as a Polarion extension. The exporter is an alternative to Polarion's native solution of converting Polarion Live Documents and Live Reports into PDF files.

## 2 Polarion configuration

This chapter has been moved to [README.md#polarion-configuration](#).

## 3 Supported Features

If you export a PDF you do not need to wait for completion. The PDF will be generated in the background and downloaded after completion. The timeout is 60 minutes.

Thanks to Weasyprint the PDF-Exporter supports:

- PDF-version: **1.4, 1.7**
- PDF-variants
  - PDF/A: **A-1b, A-2b, A-3b and A-4b**
  - PDF/UA: **UA-1**
- Direct printing of SVG-images
- CSS (partly)
  - [CSS Level 2 Revision 1](#) (passed [Acid2 Test](#)).
  - Selectors Level 3 / 4
  - CSS Text Module Level 3 / 4
  - CSS Fonts Module Level 3 / 4

## 4 Exporter description

As the extension is installed and configured to appear on Document Properties pane, you can open any document in a project where you configured PDF exporter, open Document Properties sidebar and you will see following section added there:

Document Properties

Numbered list test (Rename)

Location: Specification > Numbered list test

Type: Generic (Change)

Author: System Administrator

Updated: 1 week ago by System Administrator on 2024-01-03 16:13 (View history)

Fields

PDF Exporter

Select one of style packages in dropdown below which you wish to use during export.

Style package: E-Library

Selected style package exposes its settings, so you can redefine them.

Cover page: EuroSpec

CSS: Default

Header/Footer: Test

Localization: Test

Headers color:

Orientation: Portrait

☒ Fit images and tables to page width

☒ Follow HTML presentational hints

☐ Comments rendering

☐ Watermark

☒ Cut empty chapters (any level)

☒ Cut empty Workitem attributes

☐ Cut local Polarion URLs

☒ Mark referenced Workitems

☐ Specific higher level chapters

☐ Custom styles of numbered lists

☐ Localize enums

☐ Specific Workitem roles

File name: E-Library\_Specification\_Numbered\_list\_test.pdf

Export to PDF

Validate pages width

(rev. 47574)

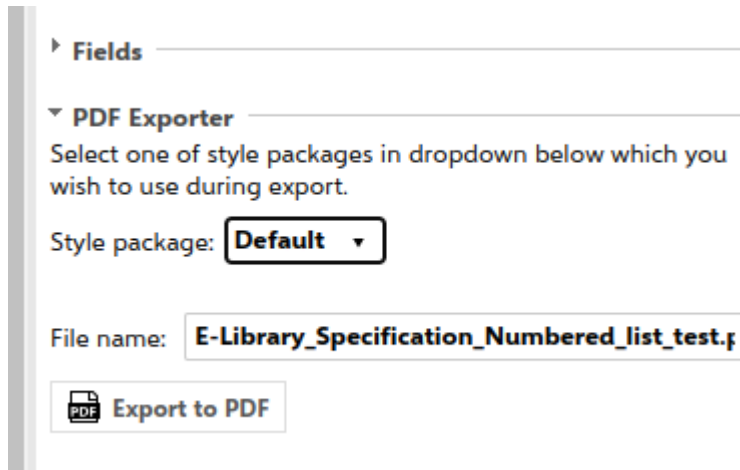
2024-07-30 13:45

3 / 22

Selected area on the screenshot above belongs to PDF exporter extension. If you just click "Export to PDF" button you will get current document converted into PDF file with default settings.

#### 4.1 Style packages

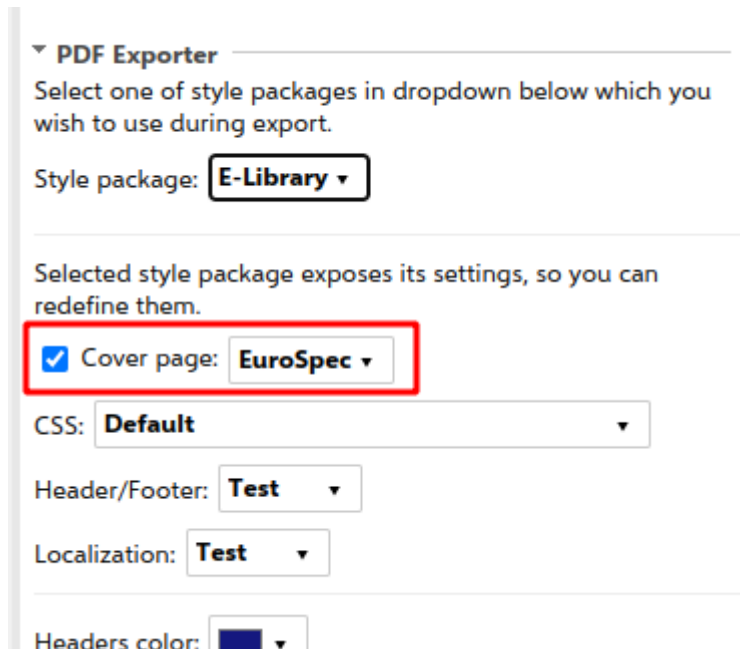
All exporter settings are combined into named style packages. Different packages can be configured different way as well as can hide their settings from being redefined by end user. In such a case you will be able only to select a package to use without possibility to redefine its settings:



In this case you can just click "Export to PDF" button relying on package settings as is.

##### 4.1.1 Cover page

In first line of options pane there's a checkbox "Cover page", if ticked a dropdown will appear right hand side to select predefined cover page template to use during PDF generation:



##### 4.1.2 Header/Footer

Settings for header/footer of generated PDF document also grouped into named settings and can be chosen in next dropdown:

▼ **PDF Exporter**

Select one of style packages in dropdown below which you wish to use during export.

Style package: **E-Library ▼**

---

Selected style package exposes its settings, so you can redefine them.


☒ Cover page: **EuroSpec ▼**

CSS: **Default ▼**

**Header/Footer: Test ▼**

Localization: **Test ▼**

---

Headers color:  ▼

#### 4.1.3 Localization

The same relates to localization settings, which one to use during PDF generation can be selected in next dropdown:

▼ **PDF Exporter**

Select one of style packages in dropdown below which you wish to use during export.

Style package: **E-Library ▼**

---

Selected style package exposes its settings, so you can redefine them.


☒ Cover page: **EuroSpec ▼**

CSS: **Default ▼**

Header/Footer: **Test ▼**

**Localization: Test ▼**

---

Headers color:  ▼

#### 4.1.4 CSS

There can be different CSS settings created on admin pane each having its own name. You can chose which of them to use during PDF generation in second dropdown of options pane:

▼ **PDF Exporter**

Select one of style packages in dropdown below which you wish to use during export.

Style package: **E-Library ▼**

---

Selected style package exposes its settings, so you can redefine them.


☒ Cover page: **EuroSpec ▼**

**CSS:** **Default ▼**

Header/Footer: **Test ▼**

Localization: **Test ▼**

---

Headers color:  ▼

#### 4.1.5 Filename template

In this section you can define a schema for the generation of the used PDF-filename. Variables can be used as well. On the left side there is the definition for LiveDocs, on the right side for LiveDocuments.

PDF Export

Filename template

SIEMENS

## PDF Exporter: Filename template

Document filename template:

```
#set($temp_docVersion = $document.getCustomField("docVersion"))
#set($temp_docDMSID = $document.getCustomField("docDMSID"))
#set($docDMSID="")
#if($temp_docDMSID)
  #set($docDMSID = " __ $temp_docDMSID")
#end
#set($docVersion="")
#if($temp_docVersion)
  #set($docVersion = " __ $temp_docVersion")
#end
#set($filename = "${projectName} __ ${document.moduleNameWithSpace}$
$filename
```

Report filename template:

```
$projectName__$page.pageNameWithSpace__$page.lastRevision
```

Save

Cancel

Default

Revisions

### Quick Help

#### How to configure Filename template

Filenames can be made scriptable by incorporating placeholders and velocity code. These filenames can contain Velocity expressions that are dynamically evaluated, allowing for the inclusion of dynamic values.

For example: {{ PROJECT\_NAME }} \$page.spaceId \$page.titleOrName \$page.lastRevision

#### Supported special variables

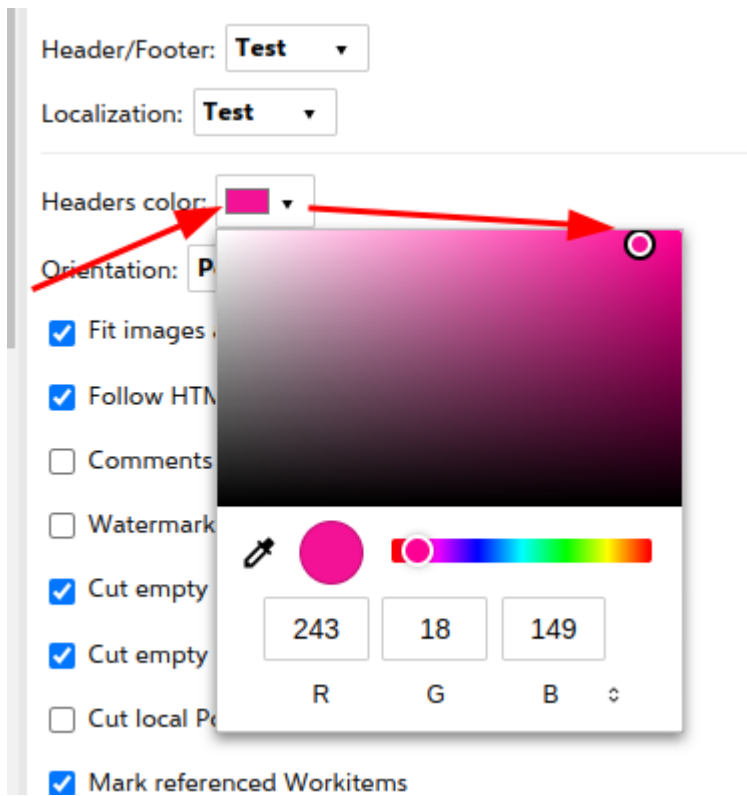
Variable	Description
{{ PROJECT_NAME }}	Project name

## 4.2 Options

A package can also expose its settings to be redefined by end user before exporting a document into PDF.

### 4.2.1 Headers color

By default dark blue color (Polarion's default) is used for headers, but you can change this selecting any other color:



As a result headers of generated PDF will be of selected color:

### 1.1 Purpose

A Product Specification is a complete description of the behavior of the product to be developed. It includes a set of User Stories that describe all the interactions that users will have with the software. In addition to User Stories, this document also contains Requirements.

### 1.2 Orphan header

### 1.3 Scope

The document describes a fictitious online eBook lending library with an optional online

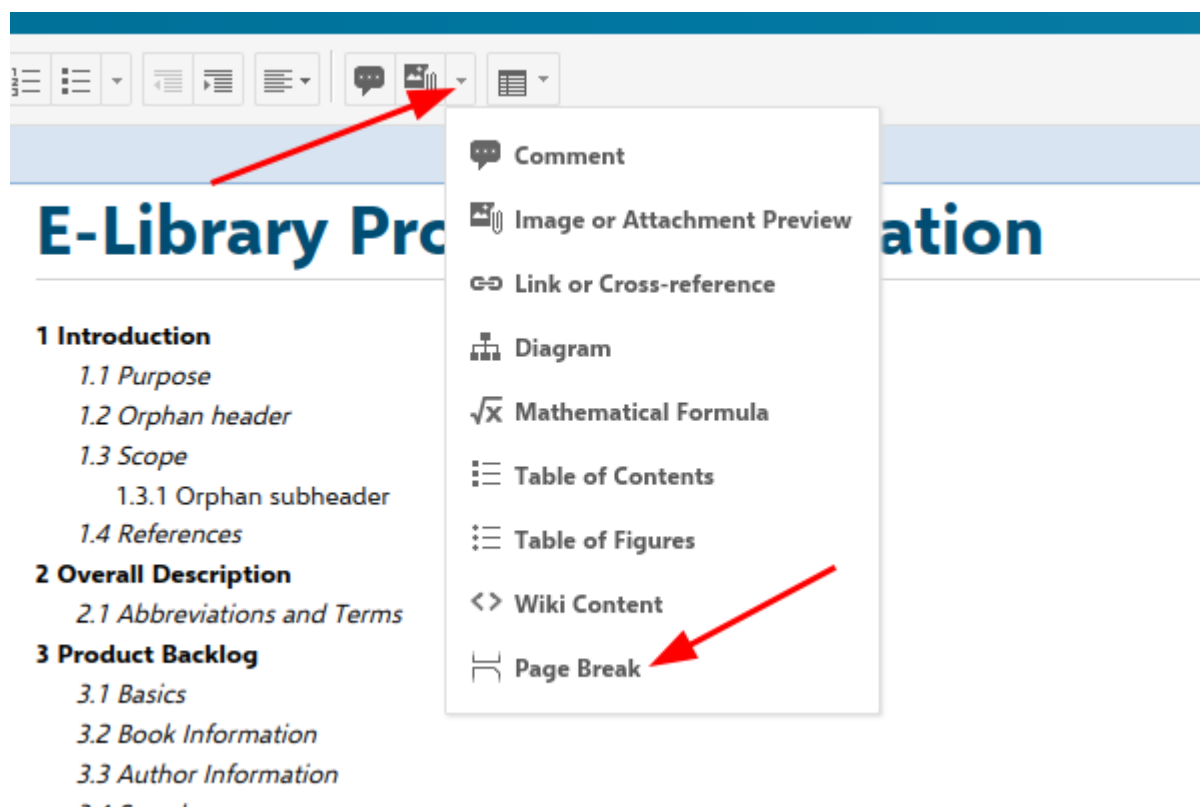
## 4.2.2 Paper size

This option specifies paper size of generated PDF document. Default is "A4".

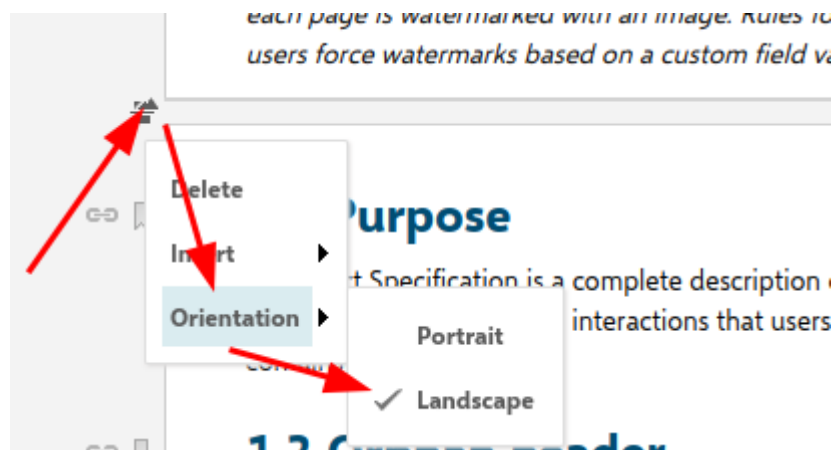
## 4.2.3 Orientation

This option serves as a document wide page orientation setting, either "Portrait" (default) or "Landscape". If you don't have page breaks in a document, then all pages in generated PDF file will have an orientation selected by you in this dropdown. However you can insert a page break in document and override this document wide setting for certain pages (starting from page break and above till the beginning of document or till other page break). Page breaks can be inserted via toolbar button:





And then you can specify custom orientation for this page break:

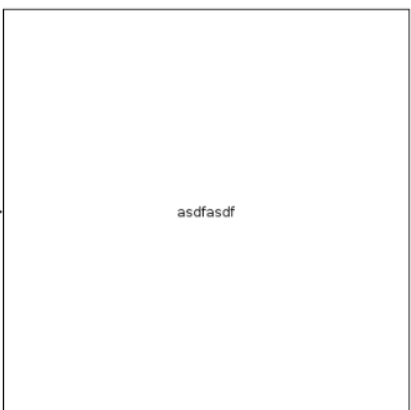


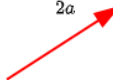
#### 4.2.4 Fit images and tables to page width

This option which is on by default tells PDF Exporter to fit images and tables into resulted page width even if their width in Polarion document exceed it.

Elements exceed Polarion document width:

Some diagram|



$$x = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$
A red arrow points to the sixth term of the equation.

#### 4.1 User Roles

And fit into PDF document width after export:

#### 4 Administration

Some diagram:



adsfasdf

→

adsfasdf

$$x = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} + \frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$

#### 4.1 User Roles



#### 4.2.5 Follow HTML presentational hints

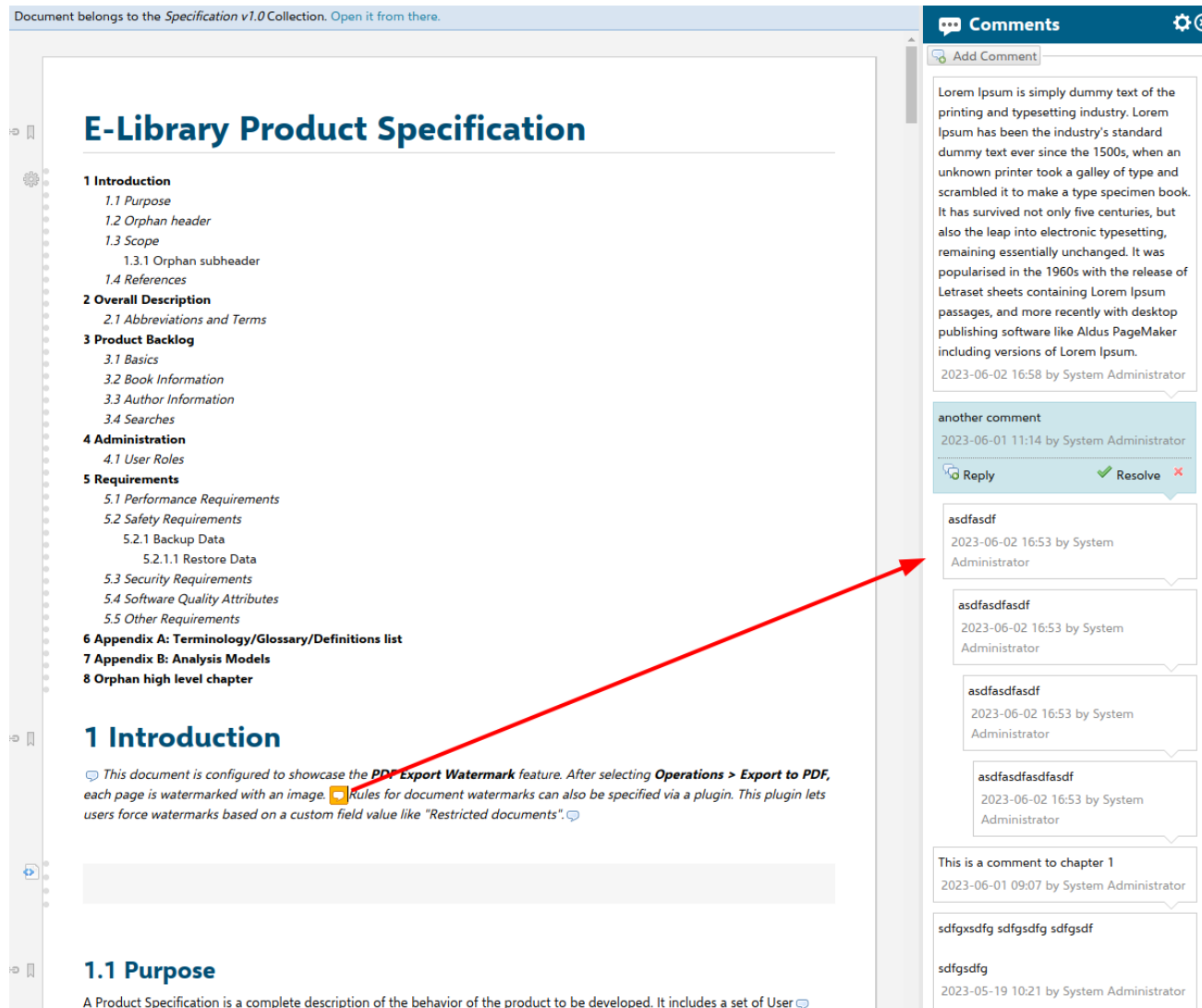
If you select this checkbox WeasyPrint will follow HTML presentational hints, i.e. if an HTML element has `width` attribute specified, it will be taken into account despite the fact that its usage is discouraged in favor of specifying width via element's `style` attribute.

#### 4.2.6 Comments rendering

This option which is on by default tells PDF Exporter to include Polarion document's comments into generated PDF document (REMARK: please take into account that this relates only to LiveDoc comments,

WorkItem comments regardless the fact they look like LiveDoc comments **won't be displayed** in generated PDF under any circumstances).

Following state of Polarion document:



Document belongs to the *Specification v1.0* Collection. [Open it from there.](#)

## E-Library Product Specification

- 1 Introduction**
  - 1.1 Purpose
  - 1.2 Orphan header
  - 1.3 Scope
    - 1.3.1 Orphan subheader
  - 1.4 References
- 2 Overall Description**
  - 2.1 Abbreviations and Terms
- 3 Product Backlog**
  - 3.1 Basics
  - 3.2 Book Information
  - 3.3 Author Information
  - 3.4 Searches
- 4 Administration**
  - 4.1 User Roles
- 5 Requirements**
  - 5.1 Performance Requirements
  - 5.2 Safety Requirements
    - 5.2.1 Backup Data
      - 5.2.1.1 Restore Data
  - 5.3 Security Requirements
  - 5.4 Software Quality Attributes
  - 5.5 Other Requirements
- 6 Appendix A: Terminology/Glossary/Definitions list**
- 7 Appendix B: Analysis Models**
- 8 Orphan high level chapter**

### 1 Introduction

This document is configured to showcase the **PDF Export Watermark** feature. After selecting **Operations > Export to PDF**, each page is watermarked with an image. Rules for document watermarks can also be specified via a plugin. This plugin lets users force watermarks based on a custom field value like "Restricted documents".

#### 1.1 Purpose

A Product Specification is a complete description of the behavior of the product to be developed. It includes a set of User

#### Comments

Add Comment

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

2023-06-02 16:58 by System Administrator

another comment

2023-06-01 11:14 by System Administrator

Reply Resolve

asdfsdf

2023-06-02 16:53 by System Administrator

asdfsdfasdfsdf

2023-06-02 16:53 by System Administrator

asdfsdfasdfsdf

2023-06-02 16:53 by System Administrator

asdfsdfasdfsdf

2023-06-02 16:53 by System Administrator

This is a comment to chapter 1

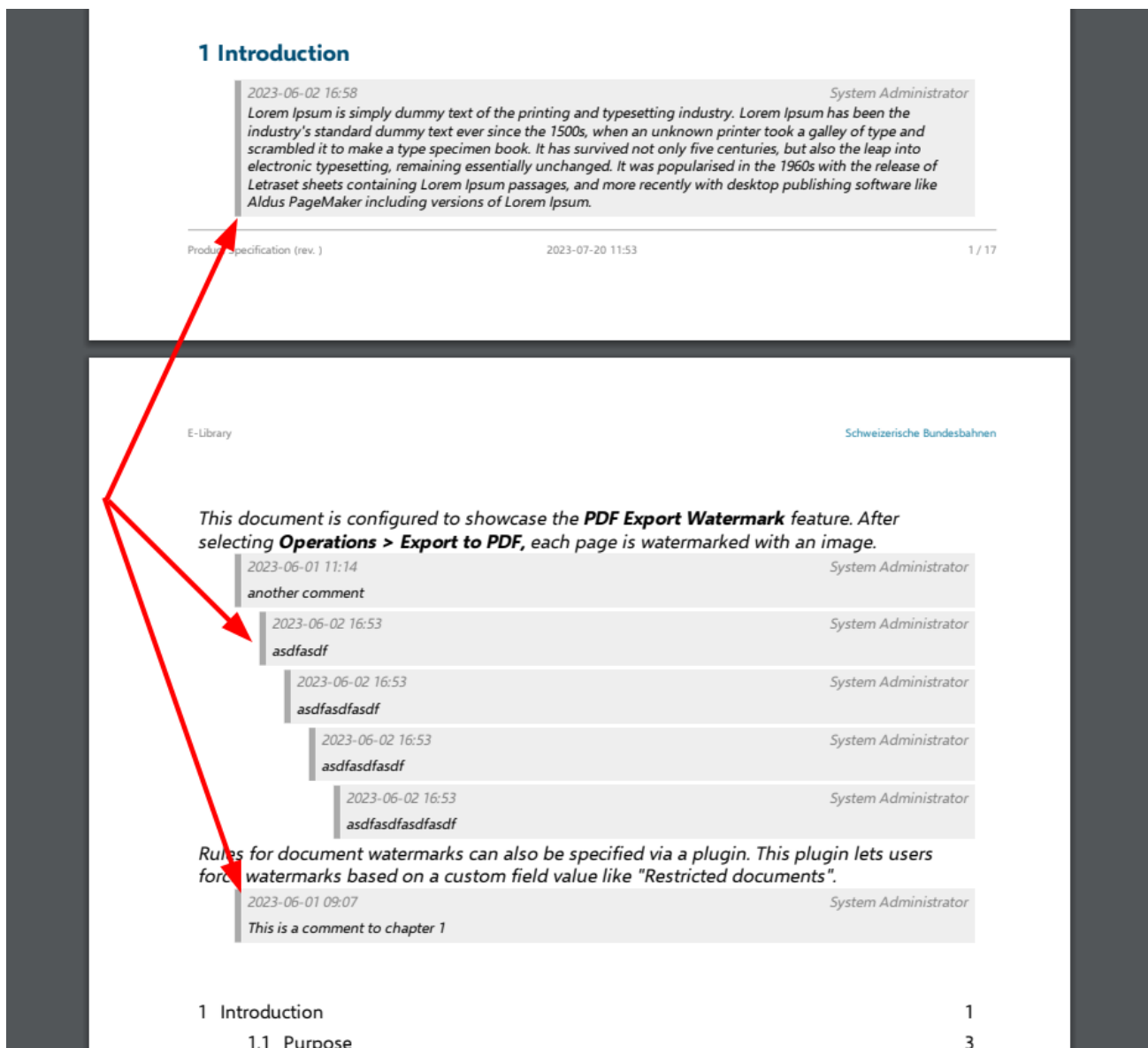
2023-06-01 09:07 by System Administrator

sdfgsdfg sdfgsdfg sdfgsdf

sdfgsdfg

2023-05-19 10:21 by System Administrator

Will result in following PDF:



**1 Introduction**

2023-06-02 16:58 System Administrator  
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Product Specification (rev. ) 2023-07-20 11:53 1 / 17

E-Library Schweizerische Bundesbahnen

This document is configured to showcase the **PDF Export Watermark** feature. After selecting **Operations > Export to PDF**, each page is watermarked with an image.

2023-06-01 11:14 System Administrator  
another comment

2023-06-02 16:53 System Administrator  
asdfsdf

2023-06-02 16:53 System Administrator  
asdfsdfasdfsdf

2023-06-02 16:53 System Administrator  
asdfsdfasdfsdf

2023-06-02 16:53 System Administrator  
asdfsdfasdfsdfasdfsdf

Rules for document watermarks can also be specified via a plugin. This plugin lets users for watermarks based on a custom field value like "Restricted documents".

2023-06-01 09:07 System Administrator  
This is a comment to chapter 1

1 Introduction 1  
1.1 Purpose 3

If you though don't want comments to be included in generated PDF document - just un-check this checkbox.

#### 4.2.7 Watermark

If you select this checkbox all pages of resulted PDF document will include "Confidential" watermark:

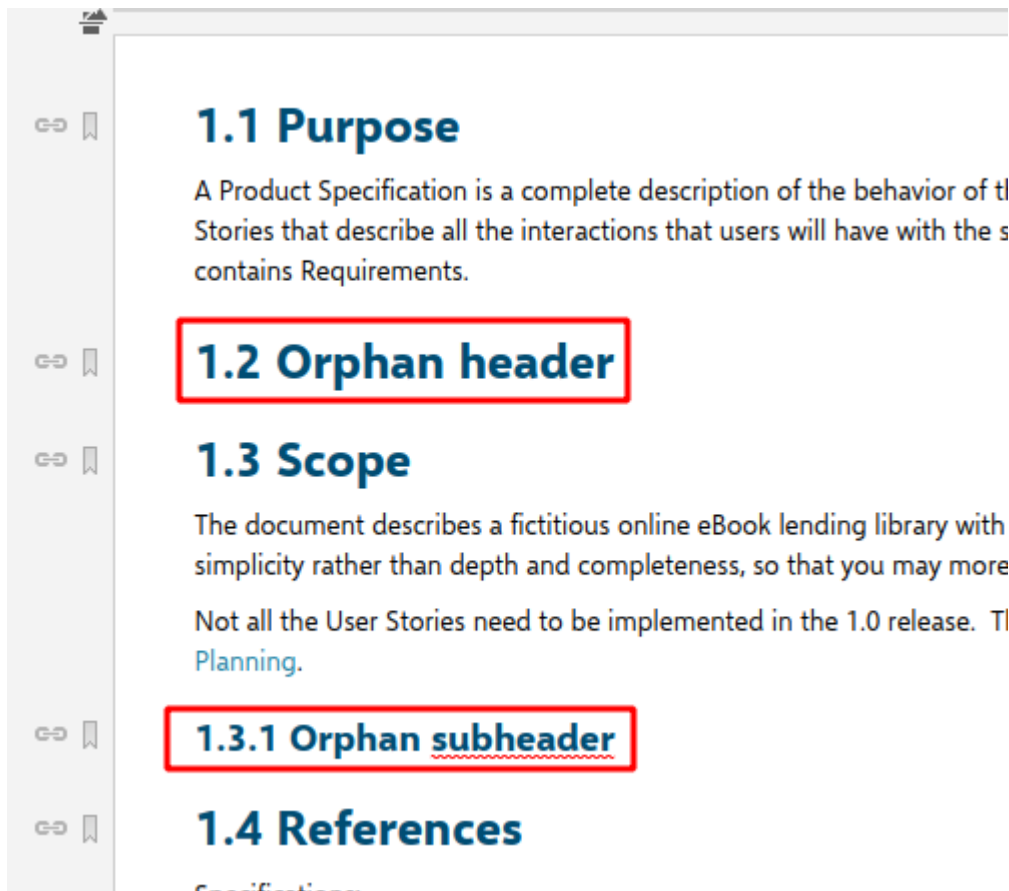
# E-Library Product Specification

---

- 1 Introduction
    - 1.1 Purpose
    - 1.2 Orphan header
    - 1.3 Scope
      - 1.3.1 Orphan subheader
    - 1.4 References
  - 2 Overall Description
    - 2.1 Abbreviations and Terms
  - 3 Product Backlog
    - 3.1 Basics
    - 3.2 Book Information
    - 3.3 Author Information
    - 3.4 Searches
  - 4 Administration
    - 4.1 User Roles
  - 5 Requirements
    - 5.1 Performance Requirements
    - 5.2 Safety Requirements
    - 5.3 Security Requirements
    - 5.4 Software Quality Attributes
    - 5.5 Other Requirements
  - 6 Appendix A: Terminology/Glossary/Definitions list
- 

## 4.2.8 Cut empty chapters (any level)

If you select this checkbox empty chapters of any level will be excluded from being exported, like these selected in screenshot:



**1.1 Purpose**

A Product Specification is a complete description of the behavior of the system. It contains Requirements.

**1.2 Orphan header**

**1.3 Scope**

The document describes a fictitious online eBook lending library with simplicity rather than depth and completeness, so that you may more easily understand the scope of the system.

Not all the User Stories need to be implemented in the 1.0 release. This is a planning phase.

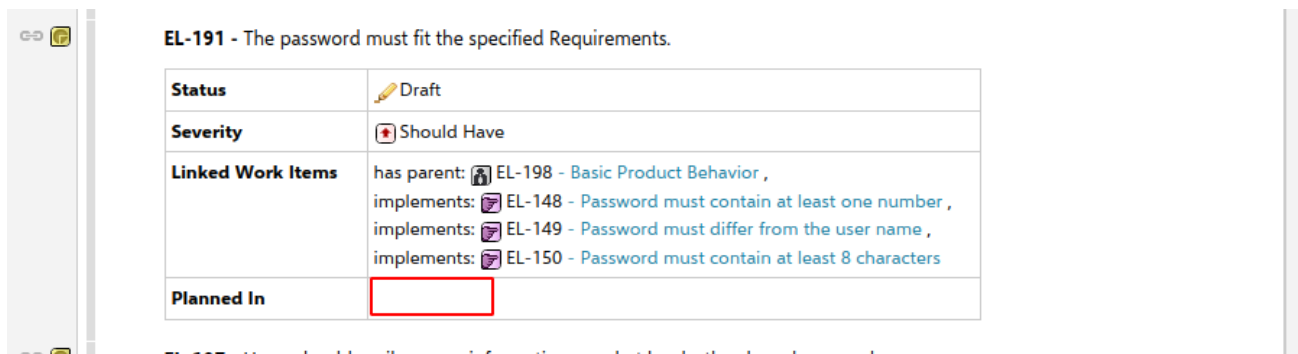
**1.3.1 Orphan subheader**

**1.4 References**

#### 4.2.9 Cut empty Workitem attributes







This option which is on by default tells PDF Exporter to exclude empty WorkItem attributes from resulted PDF document.

Empty Workitem attribute in Polarion document (tabular representation):









Status	Draft
Severity	Should Have
Linked Work Items	has parent: EL-198 - Basic Product Behavior , implements: EL-148 - Password must contain at least one number , implements: EL-149 - Password must differ from the user name , implements: EL-150 - Password must contain at least 8 characters
Planned In	







Excluded from resulted PDF document:

EL-191 - The password must fit the specified Requirements.	
Status	 Draft
Severity	 Should Have
Linked Work Items	has parent:  EL-198 - Basic Product Behavior , implements:  EL-148 - Password must contain at least one number , implements:  EL-149 - Password must differ from the user name , implements:  EL-150 - Password must contain at least 8 characters

Empty Workitem attribute in Polarion document (non-tabular representation):

EL-191 - The password must fit the specified Requirements.	
 Draft,  Should Have, has parent:  EL-198 - Basic Product Behavior , implements:  EL-148 - Password must contain at least one number , implements:  EL-149 - Password must differ from the user name , implements:  EL-150 - Password must contain at least 8 characters	[Planned In]
EL-107 - Users should easily access information on what books they have borrowed	

Also excluded from resulted PDF document:

EL-191 - The password must fit the specified Requirements. [  Draft,  Should Have, has parent:  EL-198 - Basic Product Behavior , implements:  EL-148 - Password must contain at least one number , implements:  EL-149 - Password must differ from the user name , implements:  EL-150 - Password must contain at least 8 characters ]	
EL-107 - Users should easily access information on what books they have borrowed	

#### 4.2.10 Cut local Polarion URLs

If you select this checkbox all anchors which link to local Polarion resources will be cut off leaving only text they contain:

##### 3.1 Basics

###### EL-198 - Basic Product Behavior



This Epic sums up the basic behavior of the product.

 Should Have





EL-105 - When users want to access the Elibrary portal they need to login and p

Status	 Verified
Severity	 Must Have
Planned In	 Iteration-0-(2016-12-31),  Version-0.9b-(2016-12-31)

EL-191 - The password must fit the specified Requirements.




Status	 Draft
Severity	 Should Have
Planned In	

EL-107 - Users should easily access information on what books they have borrow

Status	 Verified
Severity	 Must Have
Planned In	 Iteration-0-(2016-12-31),  Version-0.9b-(2016-12-31)

##### 3.1 Basics


###### EL-198 - Basic Product Behavior

This Epic sums up the basic behavior of the product. [ Should Have,  In Progress,  on 1.0 (2017-03-31) ]





EL-105 - When users want to access the Elibrary portal they need to login and provi valid credentials.

Status	 Verified
Severity	 Must Have
Planned In	 Iteration-0-(2016-12-31),  Version-0.9b-(2016-12-31)

EL-191 - The password must fit the specified Requirements.

Status	 Draft
Severity	 Should Have

EL-107 - Users should easily access information on what books they have borrowed

Status	 Verified
Severity	 Must Have
Planned In	 Iteration-0-(2016-12-31),  Version-0.9b-(2016-12-31)

#### 4.2.11 Mark referenced Workitems

If you select this checkbox, referenced Workitems will have special styling (dashes left hand side):

### 3 Product Backlog

Das System Concept Template funktioniert nur, wenn genau 1 WI vom Typ System vorhanden ist.

An drei Stellen im Dokument wird Wiki Content eingefügt, der z.B. aufruft:

```
#include_macros("library/macros.documentSystemConcept")  
#printSystemConceptChapterRegulations($document $showIds)
```

Das führt derzeit zu einer Fehlermeldung:

Too many (2) workitems "system" are found. There shall be only 1 workitem "system" in LiveDoc.

Das Makro sollte überprüfen ob nur 1 System vom Subtyp "Under Consideration" existiert. Weitere Systeme vom Subtyp "similar/previous" sollten möglich sein.

Cross-Reference: Zweites System im Template vom Typ similar/previous

#### 4.2.12 Specific higher level chapters

If you select this checkbox an input field will appear where you can specify which high-level chapters (as comma separated list of numbers) to be exported:

☒ Specific higher level chapters

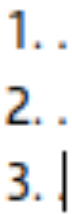
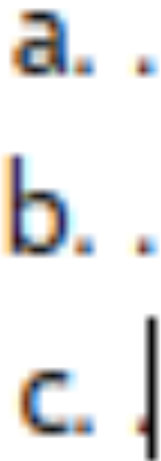
1,3

☐ Cut empty chapters (any level)

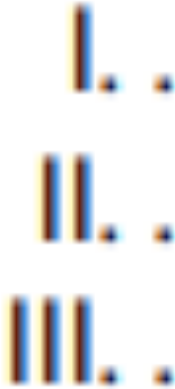
#### 4.2.13 Custom styles of numbered lists

If you select this checkbox an input field will appear where you can override default styles of numbered lists in-lined in text. Shortcuts are used for simplicity:



Shortcut	Value of <code>list-style-type</code> CSS property	Result
1	decimal	
a	lower-alpha	
i	lower-roman	

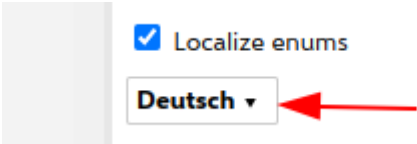
Shortcut	Value of list-style-type CSS property	Result
		<div><div>i.</div><div>ii.</div><div>iii.</div><div>iv.</div></div>
A	upper-alpha	<div><div>A.</div><div>B.</div><div>C.</div></div>
I	upper-roman	

Shortcut	Value of list-style-type CSS property	Result
		

Default styles are `1ai`. You can enter any combination, eg. `a1iAI`. Maximum depth of levels is 9. If you specify styles of less length, they will be repeated to form length of 9. For example if you enter `1ai` resulted styles will be `1ai1ai1ai`.

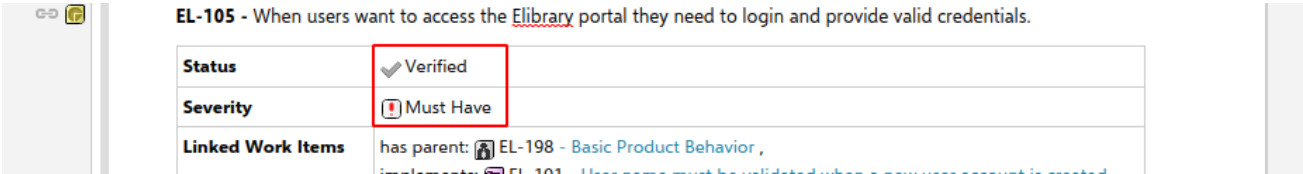
#### 4.2.14 Localize enums

If you check this checkbox and select some non-English language from appeared dropbox:



Enumeration values which translations into specified language are provided in administration will be replaced by their translations in resulted PDF document.

Enumeration values in Polarion document:



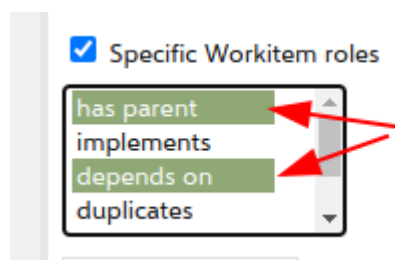
As a result are replaced by their translations:

**EL-105** - When users want to access the Elibrary portal they need to login and provide valid credentials.

Status	<input checked="" type="checkbox"/> Verifiziert
Severity	<input checked="" type="checkbox"/> Muss haben
	has parent:  EL-198 - Basic Product Behavior , implements:  EL-101 - User name must be validated when a new user account is created , implements:  EL-146 - User name may not contain spaces , implements:  EL-147 - Password must be validated when the user

#### 4.2.15 Specific Workitem roles

If you check this checkbox and select only certain roles of Workitem relations:



...then among all possible Linked Workitems:

**EL-105** - When users want to access the Elibrary portal they need to login and provide valid credentials.

Status	<input checked="" type="checkbox"/> Verified
Severity	<input checked="" type="checkbox"/> Must Have
Linked Work Items	has parent:  EL-198 - Basic Product Behavior , implements:  EL-101 - User name must be validated when a new user account is created , implements:  EL-146 - User name may not contain spaces , implements:  EL-147 - Password must be validated when the user wants to change it , implements:  EL-151 - User name must contain at least one number , implements:  EL-152 - User name must be longer than 3 characters , is implemented by: <del>EL-18</del> - Failed: Login to the portal , blocks:  EL-217 - Dependent US , is verified by:  EL-36 - Login to the portal
Planned In	Iteration 0 (2016-12-31),  Version 0.9b (2016-12-31)

...will be taken only those which correspond selected roles (both direct and reverse directions):

**EL-105** - When users want to access the Elibrary portal they need to login and provide valid credentials.

<b>Status</b>	✓ Verified
<b>Severity</b>	🚨 Must Have
<b>Linked Work Items</b>	has parent: 👤 <a href="#">EL-198 - Basic Product Behavior</a> , implements: 📁 <a href="#">EL-101 - User name must be validated when a new user account is created</a> , implements: 📁 <a href="#">EL-146 - User name may not contain spaces</a> , implements: 📁 <a href="#">EL-147 - Password must be validated when the user wants to change it</a> , implements: 📁 <a href="#">EL-151 - User name must contain at least one number</a> , implements: 📁 <a href="#">EL-152 - User name must be longer than 3 characters</a> , is implemented by: 🚨 <del>EL-18</del> - Failed: Login to the portal , blocks: 📁 <a href="#">EL-217 - Dependent US</a> , is verified by: 📁 <a href="#">EL-36 - Login to the portal</a>
<b>Planned In</b>	📊 <del>Iteration 0 (2016-12-31)</del> , 📊 <del>Version 0.9b (2016-12-31)</del>

And here is the resulted PDF document:

**EL-105** - When users want to access the Elibrary portal they need to login and provide valid credentials.

<b>Status</b>	✓ Verified
<b>Severity</b>	🚨 Must Have
<b>Linked Work Items</b>	has parent: 👤 <a href="#">EL-198 - Basic Product Behavior</a> , blocks: 📁 <a href="#">EL-217 - Dependent US</a>
<b>Planned In</b>	📊 <del>Iteration 0 (2016-12-31)</del> , 📊 <del>Version 0.9b (2016-12-31)</del>

## 5 Appendix

### 5.1 FAQs for CSS

#### 5.1.1 reducing space between header and chapter title

```
h1 {
margin-top: 3em;
font-size: 1.2em;
page-break-after: avoid;
break-after: avoid;
}
```

--> lowering margin-top

#### 5.1.2 page break before "heading 1"

```
h1 {
margin-top: 3em;
font-size: 1.2em;
page-break-after: avoid;
break-after: avoid;
}
```

--> adding break-before: page;

### 5.1.3 CSS for non printing elements

Some elements may be hidden for export to PDF. This can be achieved by applying CSS rules that set the elements' display to none:

```
#polarion-rp-parameters, #polarion-rp-page-script {  
display: none;  
}
```

## 5.2 other FAQs

### 5.2.1 my SVG images are not scaled for page width

Set the width explicitly.

### 5.2.2 generate PDFs of different variants

Weasyprint supports **pdf/a-1b**, **pdf/a-2b**, **pdf/a-3b**, **pdf/a-4b**, **pdf/ua-1**. This can be configured as parameter during call to Weasyprint (**--pdf-variant <pdf-variant>** where <pdf-variant> is one of the options above). By default a-2b is configured so the option is **--pdf-variant pdf/a-2b**.