Report Template Editor

You can print most windows, panes, or workspaces that you can see on the screen. You can also export acquisition methods, batches, quantitation Results Tables, and graph Results Tables. When exporting, you save files in formats that are appropriate for use in other programs, such as Notepad, Word, Excel, or in a Laboratory Information Management System (LIMS).

If you do not want to use the existing templates to print or export your reports, you can create new templates. You can use the Report Template Editor to customize headers, footers, and page layouts for either print or export reports. When you print a report, you send it to a printer to be printed immediately. When you export a report, you send the data to a file.

Topics in this section:

Printing Reports

You can print reports. When you print a report, you send it to a printer to be printed immediately.

Although the process of printing varies slightly from the process of publishing, the four main steps are the same.

1. **Create a template to determine the look of the report.**

   or

   Modify an existing template.
2. **Choose the report template to use for printing or exporting.**
3. **Select the window, pane, or workspace you want to print.**
4. **Print the report.**

Topics in this section:

Print Preview

You can preview, scale or copy your graphs using the Print Preview feature.

1. **Click File > Print Preview > Pane.**
2. **Edit the Print Preview dialog.**
3. **Click Print.**

Printing Without a Template

- **Click File > Print, and then click the item you want to print.**

Printing with a Template

1. **Create a template or open one that already exists.**
2. **Click File > Print & Report Setup.**

   The Print & Report Setup dialog appears.

3. In the Report Template list, click a template and then click OK.

Selecting Results Table Print Options

1. Open a Results Table.
2. Click File > Print > Pane.

   From the Results Table Print Options dialog you can select Print as is or Print Grouping the Rows by Analyte.

Adjusting Print Scaling

You can adjust the size of the object you want to print.

1. Select the pane you want to scale.
2. Click File > Print Preview > Pane.
3. In the Print Preview dialog, click the Scaling button.
4. Adjust the scaling by a percentage or by fitting to a prescribed number of pages.

Note: The scaling button is enabled only if a pane is selected. Scaling is not supported for windows and workspaces

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Selecting Peak Review Sample Report Options

1. Open peak review samples.
2. Click File > Print > Pane.
3. In the Peak Review Sample Report Options dialog, select Print Current Sample, or Print all samples.

Exporting Reports

When you export a report, you send the data to a file. You can export reports in the following formats:

- .CSV, .DOC (Acquisition Method Editor)
- .TXT (Batch Editor)
- .TXT (Quantitation)
- .txt (Graphs and Spectra)

Topics in this section:

What Types of Reports Can I Export?

You can export four types of reports: acquisition methods, batches, Results Tables, and graph results tables. When you export, you save files in formats that are appropriate for use in other programs, such as Notepad, Word, Excel, or in a Laboratory Information Management System (LIMS).

- acquisition methods
- batch details
- graphs, spectra, or tables
- results tables, peak reviews, or calibration curves

Exporting a Report

1. Click File > Export.

   The Save As dialog appears.
2. Type the name of the file.
3. Select the file type (.CSV, .DOC, .TXT, .txt) depending on the type of report you are exporting.

4. If you are exporting a report Results Table, select either **All Columns**, or **Visible Columns** from the Export group and then click **Save**.

Designing Reports

If you are not using an existing template to print or export a report, you can create a new one or modify an existing one.

Topics in this section:

Creating a Report Template

If you are not using an existing template to print or export a report, you must create a new one.

1. Click File > **New** > **Report Template**.

   The Report Template Editor Dialog: Header/Footer Design tab appears.

   Note: Individual options are available to users depending upon security level.

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2. Select a header or footer box.

   The box appears outlined in red on the screen. This outline will not print on the document.

3. In the **Fields** list on the left, expand the required elements.
4. Double-click a design element. If the field chosen is Date, Time, or Custom Field, fill in the dialog that appears and then click OK.

   The design element is added to the selected header or footer box.

5. Repeat steps 3 to 4 until you have completed your template. You do not need to fill in all of the boxes.
6. Click the Page Setup tab.
7. Select **Landscape** or **Portrait** from the Page Orientation.
8. Set margins to provide the appropriate space for the header and footer you have just created.

   The value must be set to some value other than zero to enable a proper print out. Default margins are provided for a total of 4 lines of header or footer using the default font.

9. If required, in the **From Edge** group, type the distance from the distance from the edge of the page to the first line of the header and the last line of the footer.
10. Click File > **Save**.

Modifying an Existing Report Template

You can edit a template you have created, or you can modify an existing template to create a new one that suits your own needs. Start with a template that is similar to what you want to create.

1. On the Navigation bar, click the **Report Template Editor**.

2. Click File > Open. Make sure that the Report Template (*.rpt) is selected for the Files of type field.
3. Double-click one of the files listed in the Files window.
4. Modify the template as necessary. For more information, see Adding an Element to Your Template.
5. Save the file with either the same or a new name, depending on whether you want to write over the original template or not.

Adding a Design Element to Your Template

You can customize your reports by adding different types of information to the headers and footers. There are three types of information that can be added to you reports.

- Basic Design Elements
- Quantitation Elements
- Acquisition Elements

1. Click File > Open.
2. In the Files of Type field, select Report Template (*.rpt).
3. Select a template.
4. In the Header / Footer Design tab of the Report Template Editor dialog select the area where you want the information to appear.
5. From the left window, select the elements.
6. Click File > Save.

Adding a Date

You can include the date in your design for report headers and footers.

1. In the Header/Footer Design tab of the Report Template Editor dialog, click the area in which you want the date to appear.
2. Expand Design Elements.
3. Double-click Date.

   The Date Format dialog appears.
4. Select a format and then click OK. If you have selected the numerical option, select a separator too.

Note: If you choose the 2-digit date format, and the year is less than 70, then it is based on the year 2000.

Adding the Time

You can include the time of printing in your design for report headers or footers.

1. In the Header/Footer Design tab of the Report Template Editor dialog, click in the header or footer area where you want the time to appear.
2. Expand Design Elements.
3. Double-click Time.

   The Time Format dialog appears.
4. Select a format and then click OK.

Adding a Custom Field

You can include your own text and/or graphics, such as a logo, in a report header or footer.

1. In the Report Template Editor Header/Footer Design tab, click in a header or footer area.
2. Expand Design Elements.
3. Double-click Custom Field.

The Custom Field Settings dialog appears.

4. Add the text or graphics you want to appear in the header or footer and then click OK.

Setting Margins

You can choose the margins for the page as well as the margins for the header and footer areas of your report.

1. In the Report Template Editor window, click the Page Setup tab.
2. In the Margins group, specify each margin (Top, Bottom, Right, Left header or footer).

Note: The header margin must be less than the top page margin for a header to show and the footer margin must be less than the bottom page margin for the footer to show.

Adding a Graphic

You can place a graphic into an area of the header or footer of a report. The graphic must be in bitmap (.bmp) format.

1. In the Report Template Editor window, click the Header/Footer Design tab.
2. Expand Design Elements.
3. Double-click Custom Field.

   The Custom Field Settings dialog appears.
4. Click the Graphics File option.
5. Click the button to the right of Graphics File to navigate to the folder containing the graphics or Acquisition Elements file.
6. Select the file and then click OK.

Adding Customized Text

You can add customized text to an area in the header or footer of a report.

1. In the Report Template Editor window, click the Header/Footer Design tab.
2. Click Design Elements.
3. Double-click Custom Field.

   The Custom Field Settings dialog appears.
4. Click the Text option.
5. Type text in the box and then click OK.

   The boxes in the header and footer are of fixed size. Any text that is too long for the box will be truncated.

Selecting a Destination

If you do not specify a destination printer, then the Windows default printer is used.

1. On the Navigation bar, under Configure mode, double-click Report Template.

   The Report Template Editor dialog appears.
2. Create a new template.

   or

   Open an existing template.
3. Click the Page Setup tab.
4. In the Select Destination field, click Printer.

Using an Existing Template

You can use an existing template when you print.

1. Click File > Print & Report Setup.

   The Print dialog appears.

2. In the Report Template group, select a template and then click OK.

Opening a Template

There are two ways to open an existing template. The method you choose depends upon whether you want to view the template settings, or are ready to print.

Topics in this section:

Opening an Existing Template to View the Settings

1. Click File > Open.
2. Make sure that the Files of Type field shows Report Template *.rpt, and then select a template from the list.
3. Click OK.

   The Report Template Editor dialog: Header/Footer Design tab appears with the chosen template.

Selecting an Existing Template when you are Ready to Print

1. Click File > Print & Report Setup.

   The Print & Report Setup dialog appears.

2. Click the required file from the Report Template group and then click OK.