Report Designer

By <73Lines/> Version 1.0

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Introduction

Allows user to create PDF or HTML report(s) on website using website builder and also modify existing report(s) or created using report designer.

1. Create PDF or HTML Report(s).
2. Modify PDF or HTML Report(s).
3. Report Preview.
4. Customize Tag Attribute(s).
5. Use XML function(s) and Current Object (class) function(s).
6. Export Report.
7. Custom Report Templates.
8. Provide HTML (XML) Editor.

Installation

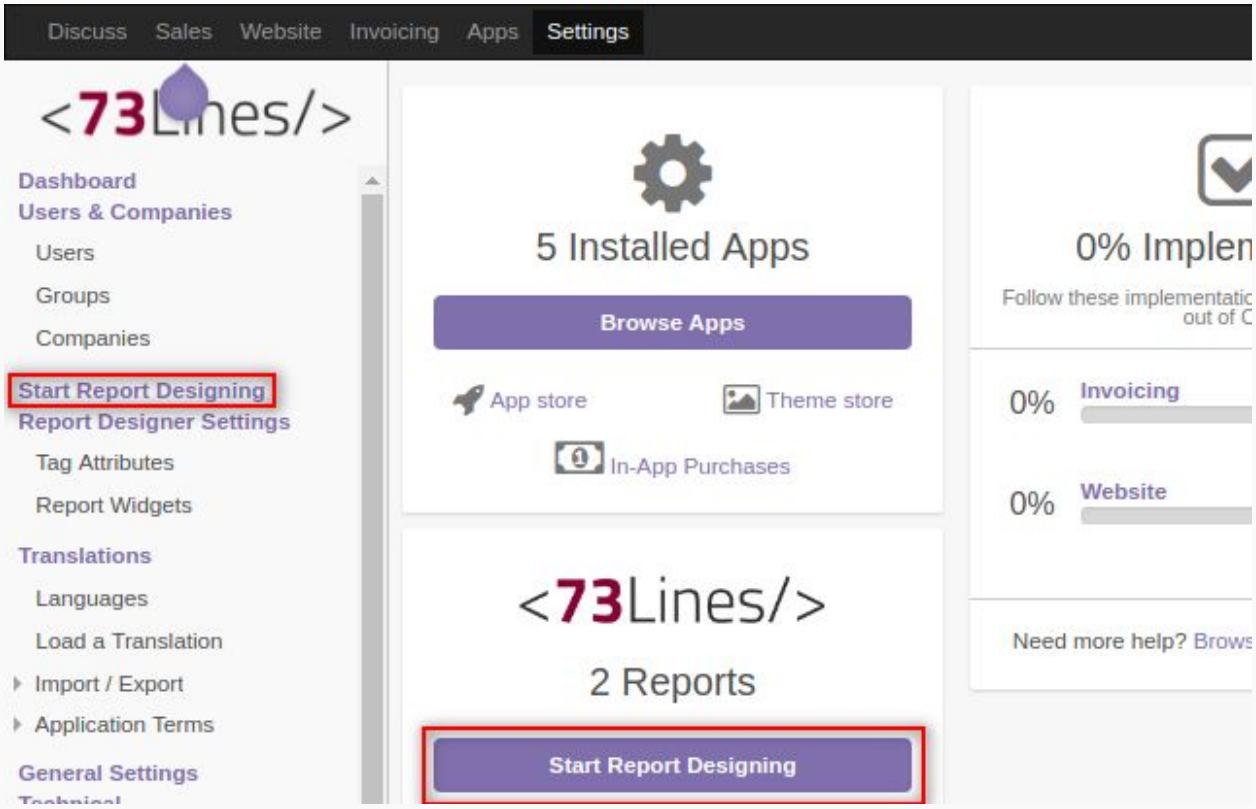
1. Go To the Apps menu.
2. Search Report Designer and then appear Report Designer App.

3. Click on install Button.
4. After complete installation it will appear in “Settings” Menu.

Create PDF or HTML Report(s).

Allows user to create either PDF or HTML report(s) that appear on top of the form view in Print Dropdown. To create report follow below steps:

1. Go to the “Settings” Menu.



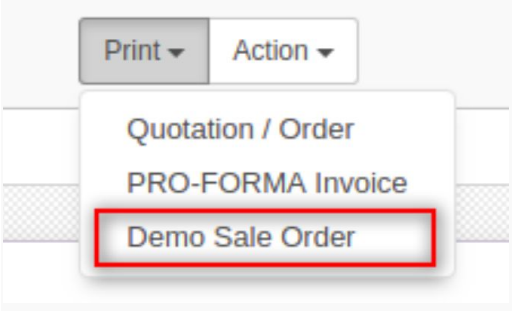
2. Click on **Start Report Designing**.
3. Select model (table) name.

4. Fill the name of Report name.

5. Select Paper Format.

6. Select Report Type.

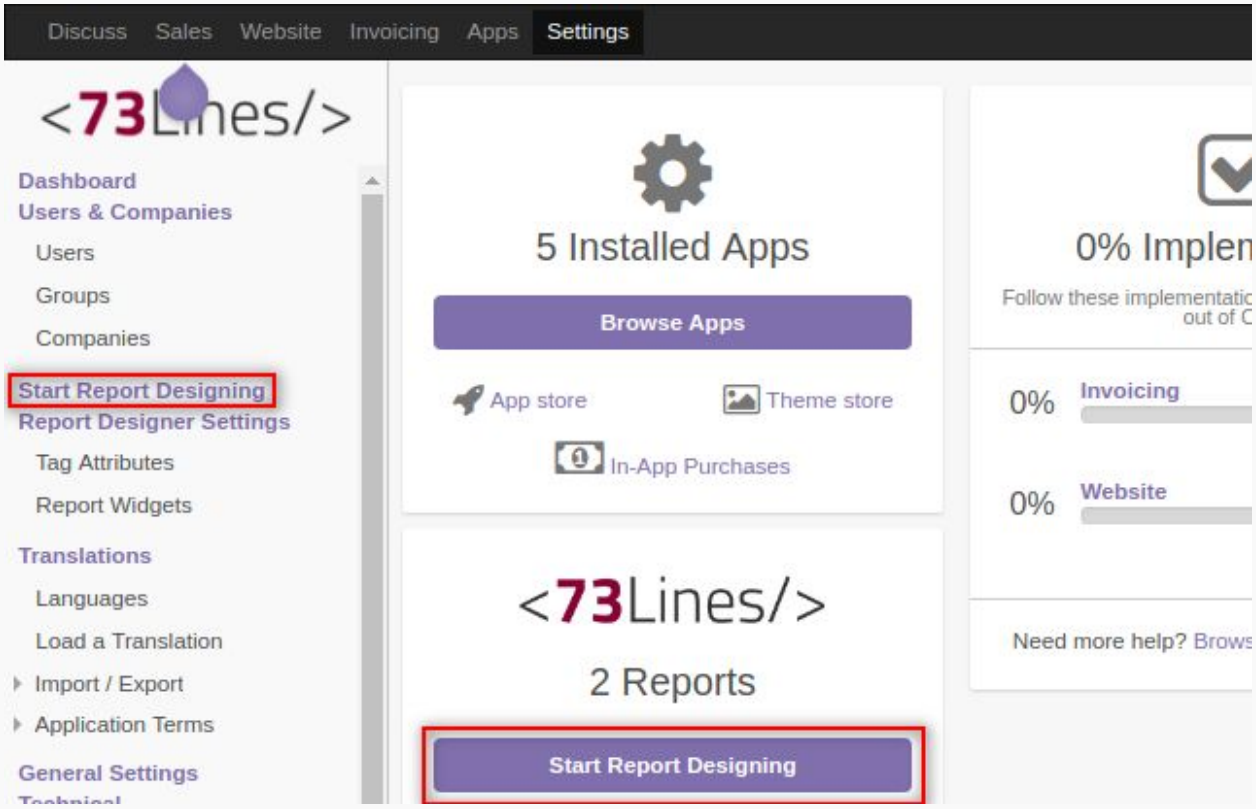
7. Click on the create button and User will get blank report on your screen.
8. And also User will see new report in Print Dropdown on “sale.order” Quotations.



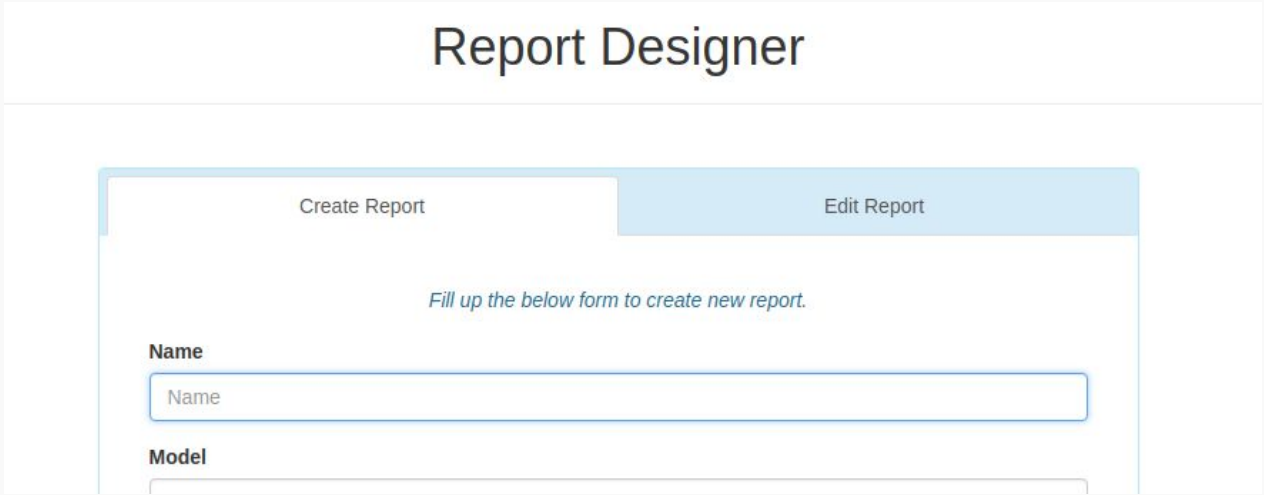
Modify PDF or HTML Report(s).

Allows user to Modify report(s) that created using Report Designer. To modify report follow below steps:

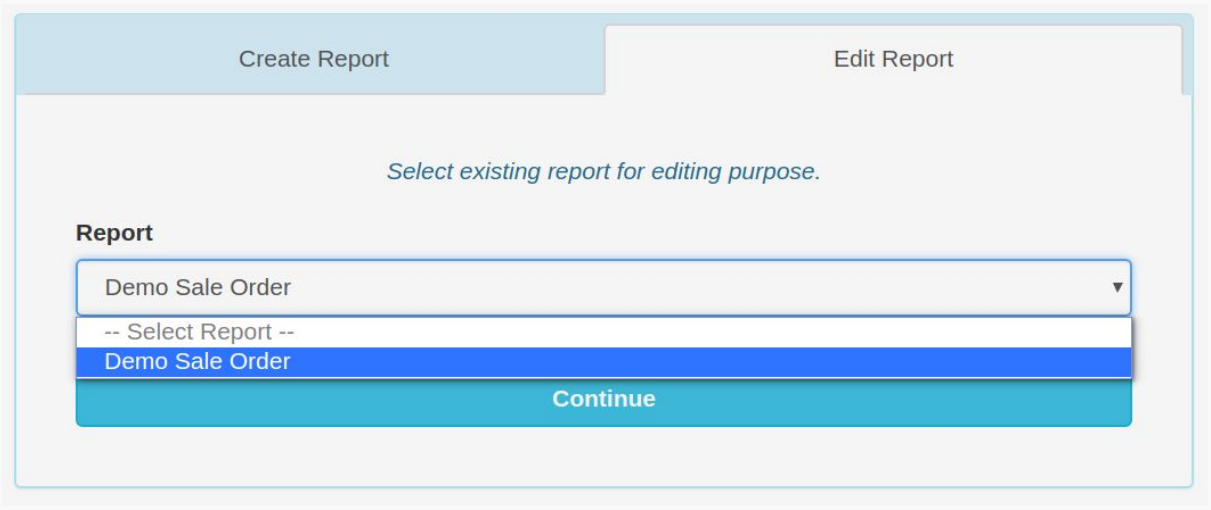
1. Go to the Report Designer Menu.



2. Click on **Start Report Designing**.
3. User will see something like below image.



4. Click on “Edit Report” Tab and select existing Report.

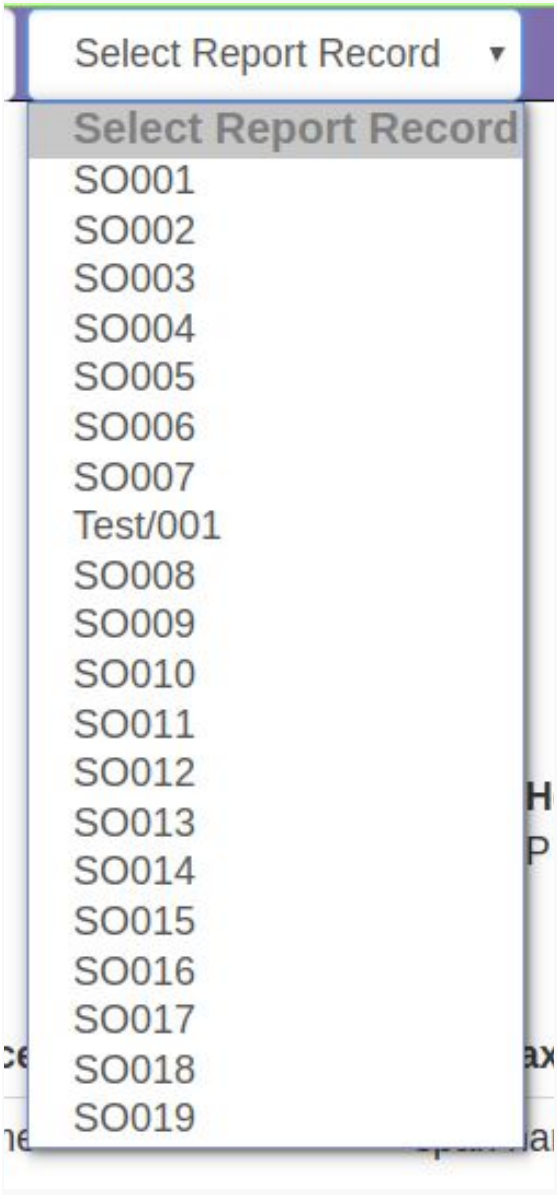


5. Click on “Continue” Button and User will get existing report for edit.

Report Preview.

Allows user to see report layout during report modification. Head to website selection is available on top right corner that list have all records of current model (table) e.g. “sale.order” according record name field.

Select the record from selection. It will automatically open in new browser tab.



Customize Tag Attribute(s).

Tag Attributes are Template directives that are specified as XML attributes prefixed with t-.

Tag Attributes are:

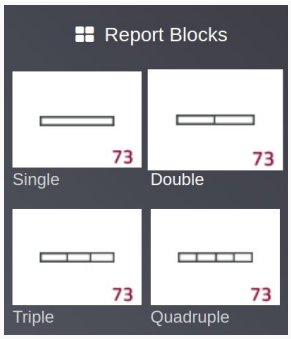
1. t-if : It evaluates an expression given as attribute value
2. esc : It takes an expression, evaluates it and prints the content.
3. t-foreach : It take an expression returning the collection to iterate on, and a second parameter t-as providing the name to use for the "current item" of the iteration.
4. t-set : it takes the name of the variable to create and t-value is use to set the value.
5. t-field : It can only be used when performing field access (a.b) on a "smart" record (result of the browse method). It is able to automatically format based on field type, and is integrated in the website's rich text edition.
6. t-options or t-field-options: It can be used to customize fields, the most common option is widget, other options are field- or widget-dependent.
7. groups : Many2many field to the groups allowed to view/use the current report.
8. class : Twitter Bootstrap and Font Awesome classes can be used in your report template
9. style : Local CSS can be put directly in the template.

PDF or HTML report is dynamic so user needs to set tag attribute for dynamism.

1. Add Tag Attribute(s)

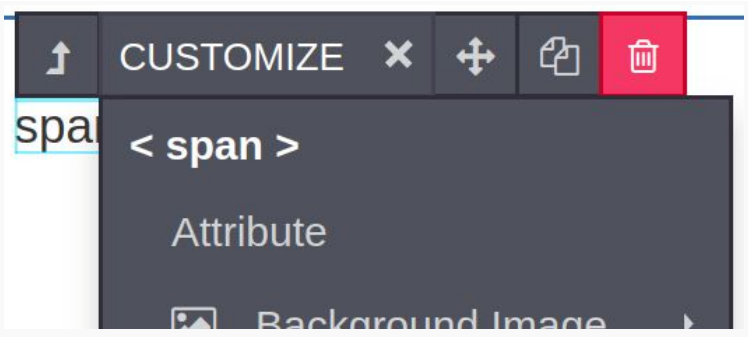
To add tag attribute(s) follow below steps:

1. Once report created, Head To Website click on “Edit” button on top right corner, In Drag and Drop blocks container snippet from report block section.

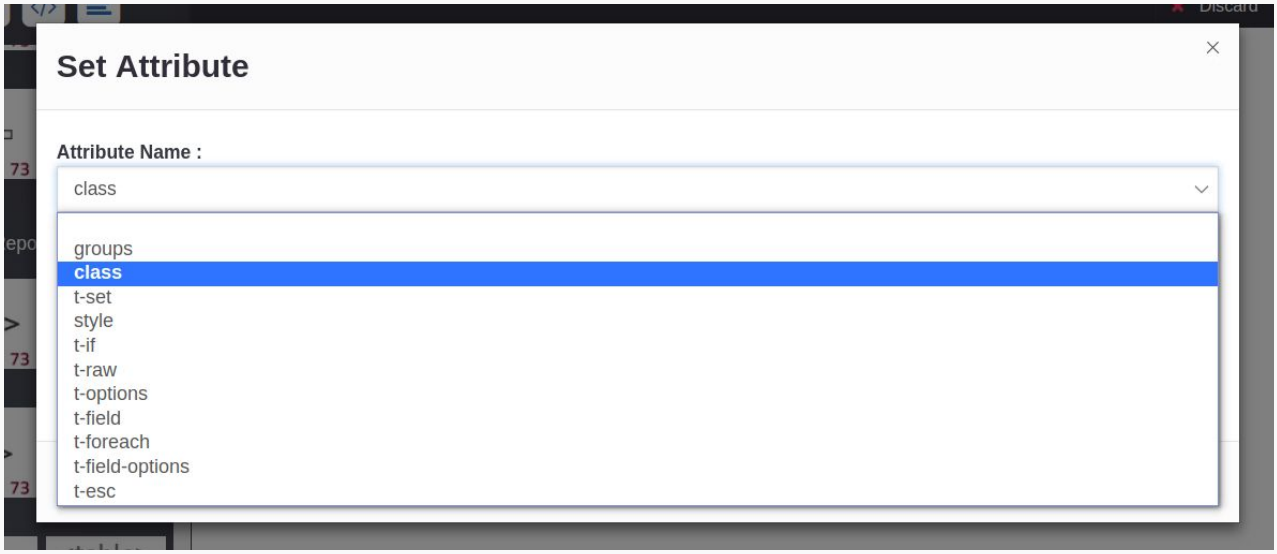


2. After dropping container snippet user needs to drop report contents snippet(s).

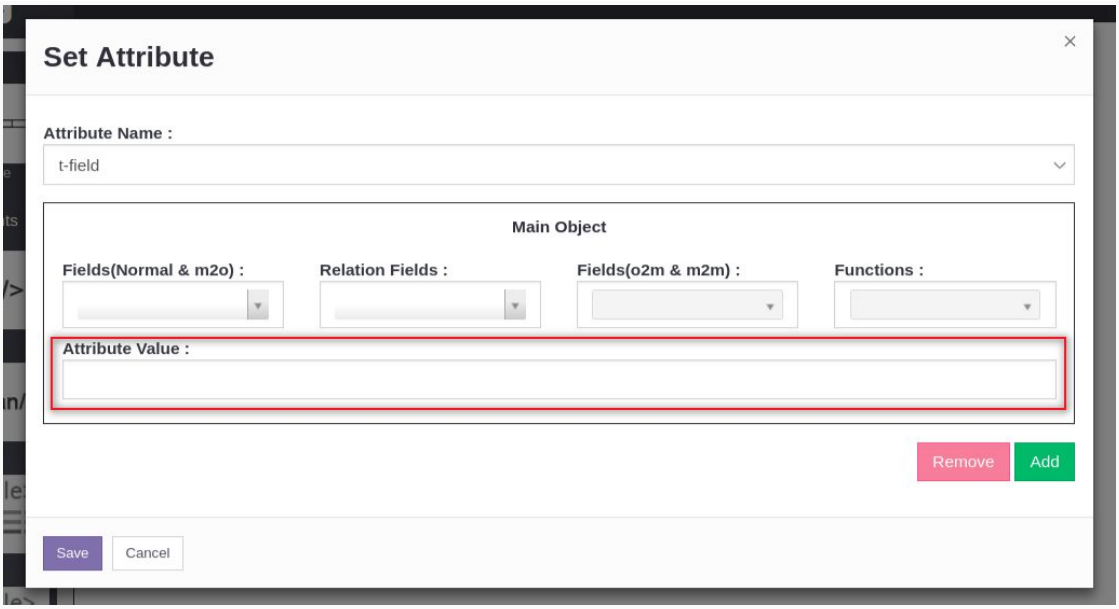
3. After doing above steps user will see some span text.
4. Click over span text it will display toolbox and then click on “CUSTOMIZE”. user will see dropdown.



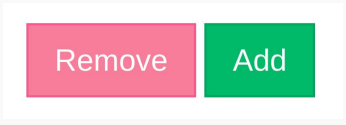
5. Click on “Attribute”. It will open dialog for attribute.
6. Select “Attribute Name”, User want to set attribute on tag.



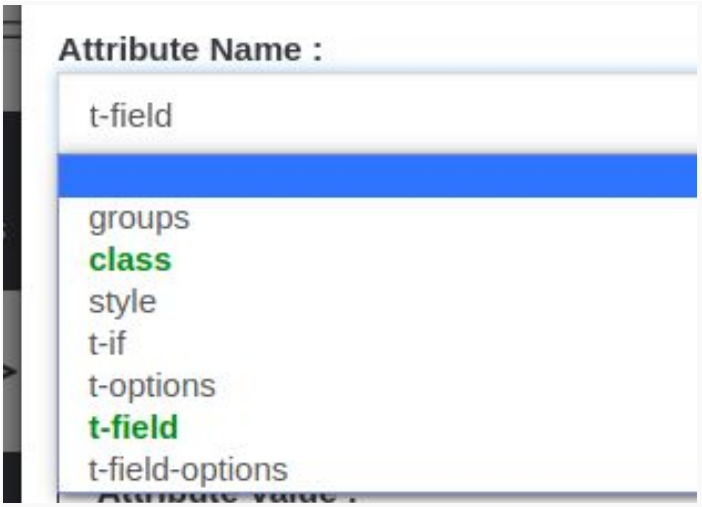
7. On select or change any attribute it will display attribute value text box for set attribute value.



8. simply set the value and click on “Add” button then click on “Save”. It will add attribute(s) on particular tag.



9. Here is many option for set its value according attribute, like model field, model relational field, model function. And also here user can set multiple attributes on tag. Already set attribute display green color in attribute selection.

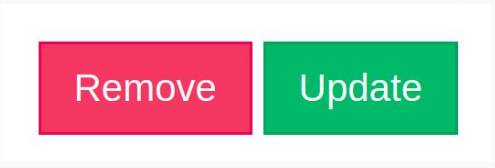


10. Click on “Save” button on top right corner for save entire report.

2. Update Tag Attribute(s)

To update tag attribute(s) follow below steps:

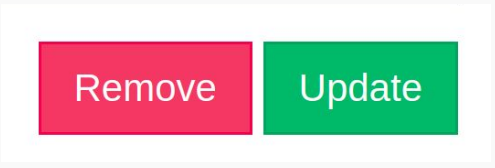
1. Follow 1 to 5 steps of “Add Tag Attribute(s)”.
2. Select attribute user want to update.
3. Change value of attribute.
4. Once change value, click on “Update” button and click to “Save” button on attribute dialog.



3. Remove Tag Attribute(s)

To remove tag attribute(s) follow below steps:

1. Follow 1 to 5 steps of “Add Tag Attribute(s)”.
2. Select attribute user want to remove.
3. Click on “Remove” button and click to “Save” button on attribute dialog.



Note:

1. Here give user to selection

   eg. 1. Normal, m2o and its relational field for `t-field` attribute.

   2. M2m field, o2m field and model function for `t-foreach` attribute.

   3. Autocomplete css class name for `class` attribute.

Use XML function(s) and Current Object (class) function(s).

Allows user to use current model function (eg. `sale.order function`) and XML function (eg. `len`, `join`, `lambda`, `map`, `tuple`, `round`, `int`, `float`, `str`) in attribute value. And also gives complex expression (eg. `', '.join(map(lambda x: x.description or x.name, l.invoice_line_tax_ids))`) as attribute value.

Export Report.

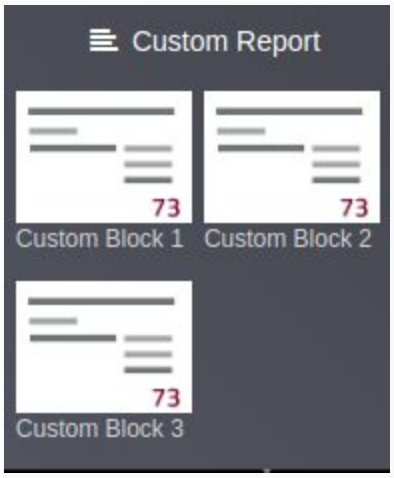
Allows user to export report as zip file that created using report designer and user will get “.pot” file in zip module for report translation.

How to use?

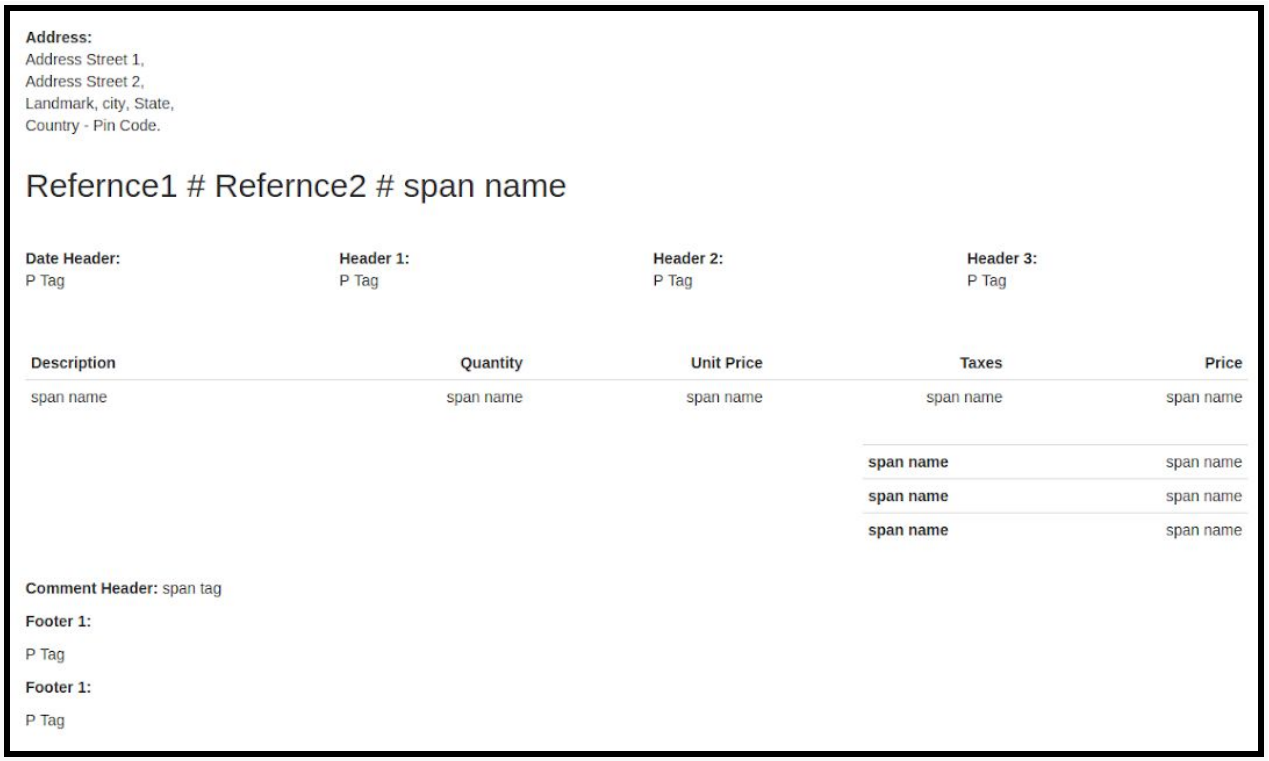
1. Already exported zip file simply unzip and place to addons folder.
2. Go to app menu and update app list.
3. Search module and install it.

Custom Report Templates.

This provide user to custom report templates. No needs to create manually structure of report. Drag and Drop snippet from custom report snippet section and after doing user can change custom template if user wants.



eg. custom report template design shown below:



Address:
Address Street 1,
Address Street 2,
Landmark, city, State,
Country - Pin Code.

Refernce1 # Refernce2 # span name

Date Header:	Header 1:	Header 2:	Header 3:
P Tag	P Tag	P Tag	P Tag

Description	Quantity	Unit Price	Taxes	Price
span name	span name	span name	span name	span name

span name	span name
span name	span name
span name	span name

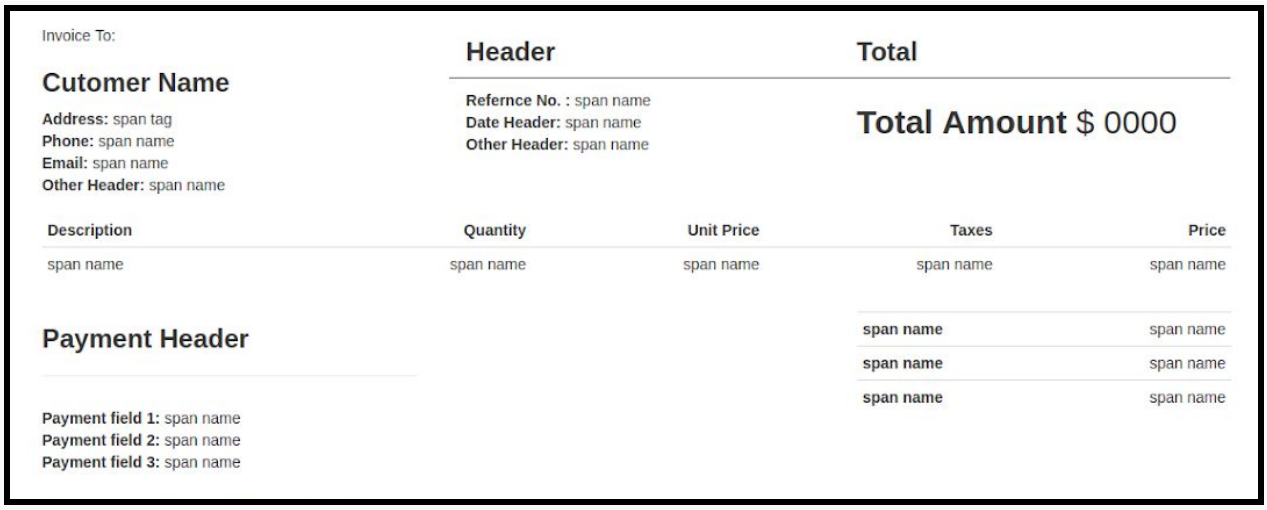
Comment Header: span tag

Footer 1:

P Tag

Footer 1:

P Tag



Invoice To:

Cutomer Name

Address: span tag
Phone: span name
Email: span name
Other Header: span name

Header

Refernce No. : span name
Date Header: span name
Other Header: span name

Total

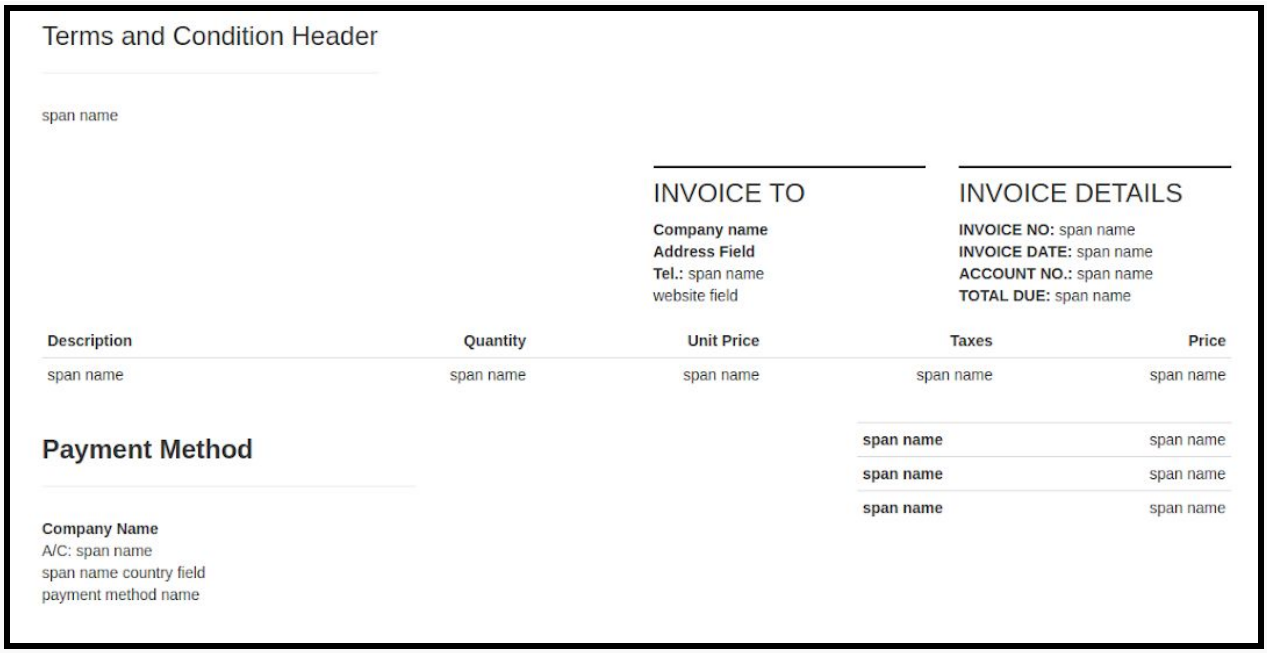
Total Amount $ 0000

Description	Quantity	Unit Price	Taxes	Price
span name	span name	span name	span name	span name

Payment Header

Payment field 1: span name
Payment field 2: span name
Payment field 3: span name

span name	span name
span name	span name
span name	span name



Terms and Condition Header

span name

INVOICE TO

Company name
Address Field
Tel.: span name
website field

INVOICE DETAILS

INVOICE NO: span name
INVOICE DATE: span name
ACCOUNT NO.: span name
TOTAL DUE: span name

Description	Quantity	Unit Price	Taxes	Price
span name	span name	span name	span name	span name

Payment Method

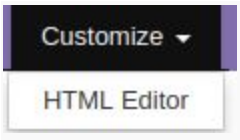
Company Name
A/C: span name
span name country field
payment method name

span name	span name
span name	span name
span name	span name

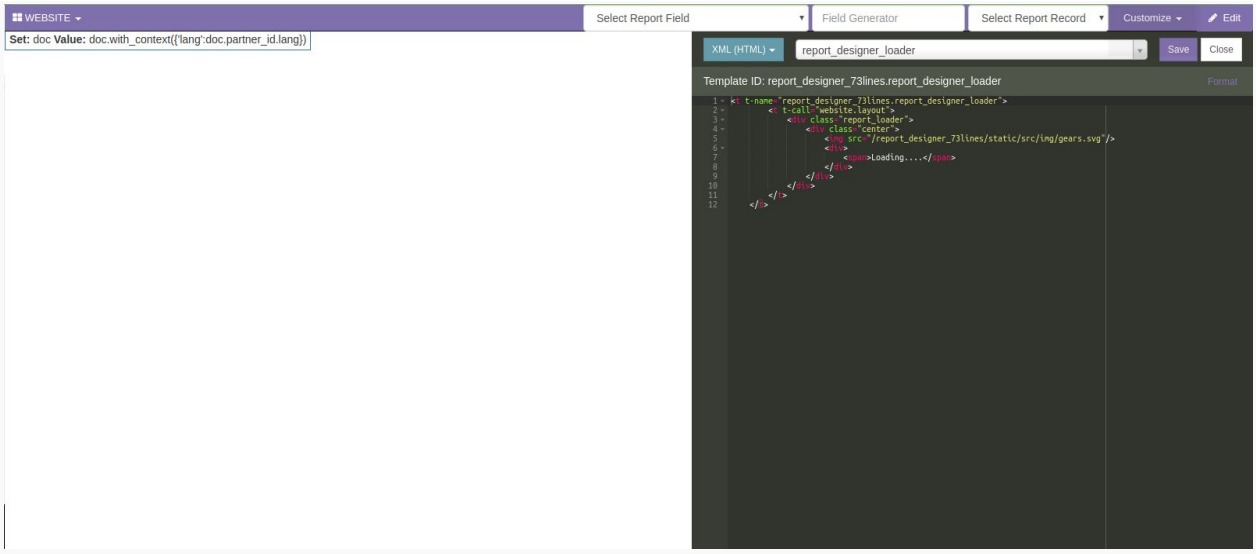
Provide HTML (XML) Editor.

This provide user to HTML (XML) editor for edit code of existing report that created using report designer and this is way to make changes manually in report code but it require knowledge of create report manually by code. This facility provide after report created.To open editor follow below steps:

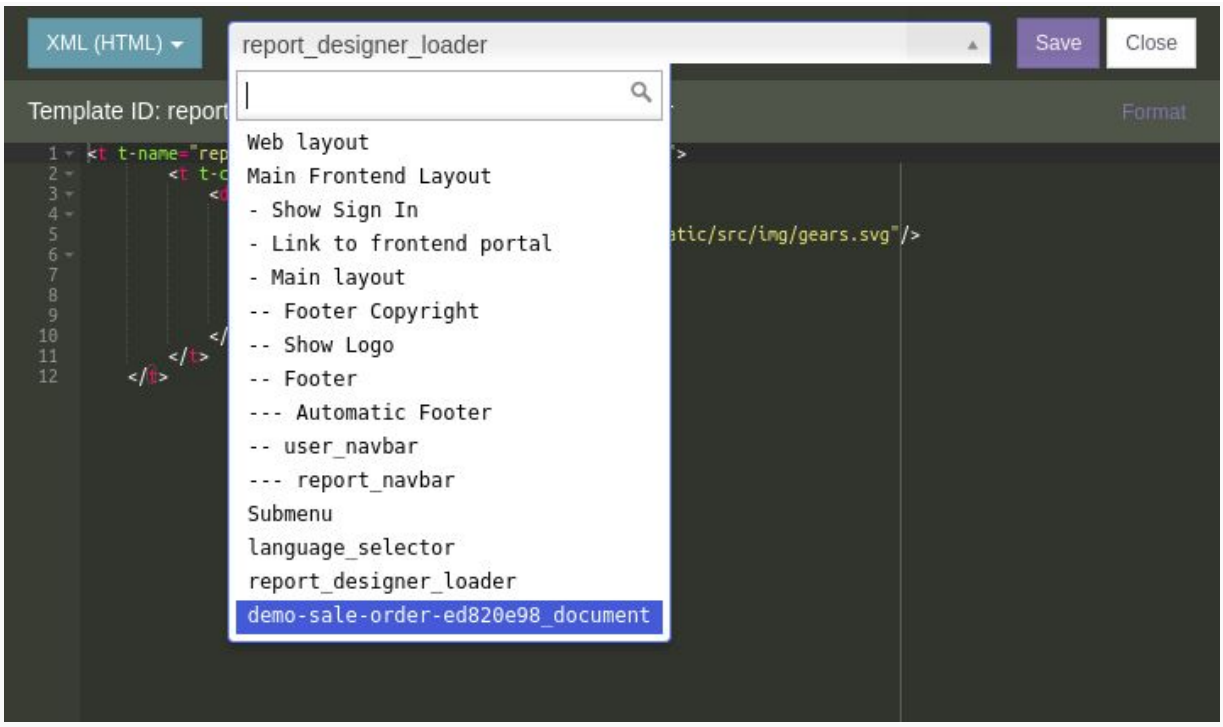
1. Head to website click on “Customize” on top right corner.



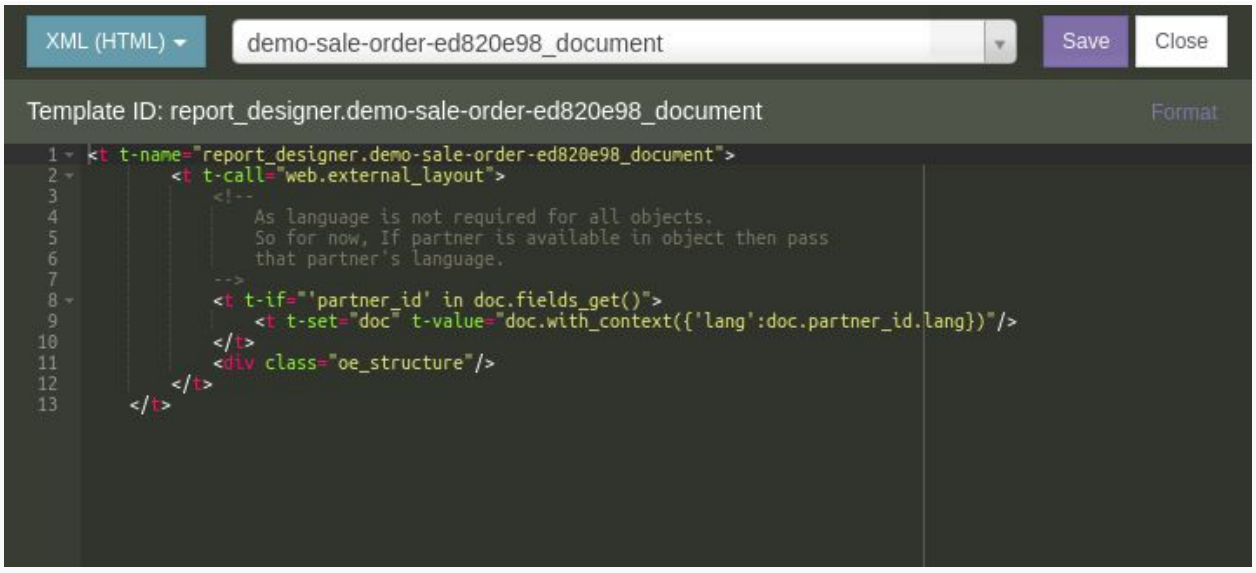
2. Click on “HTML Editor” and User will see something like below image.

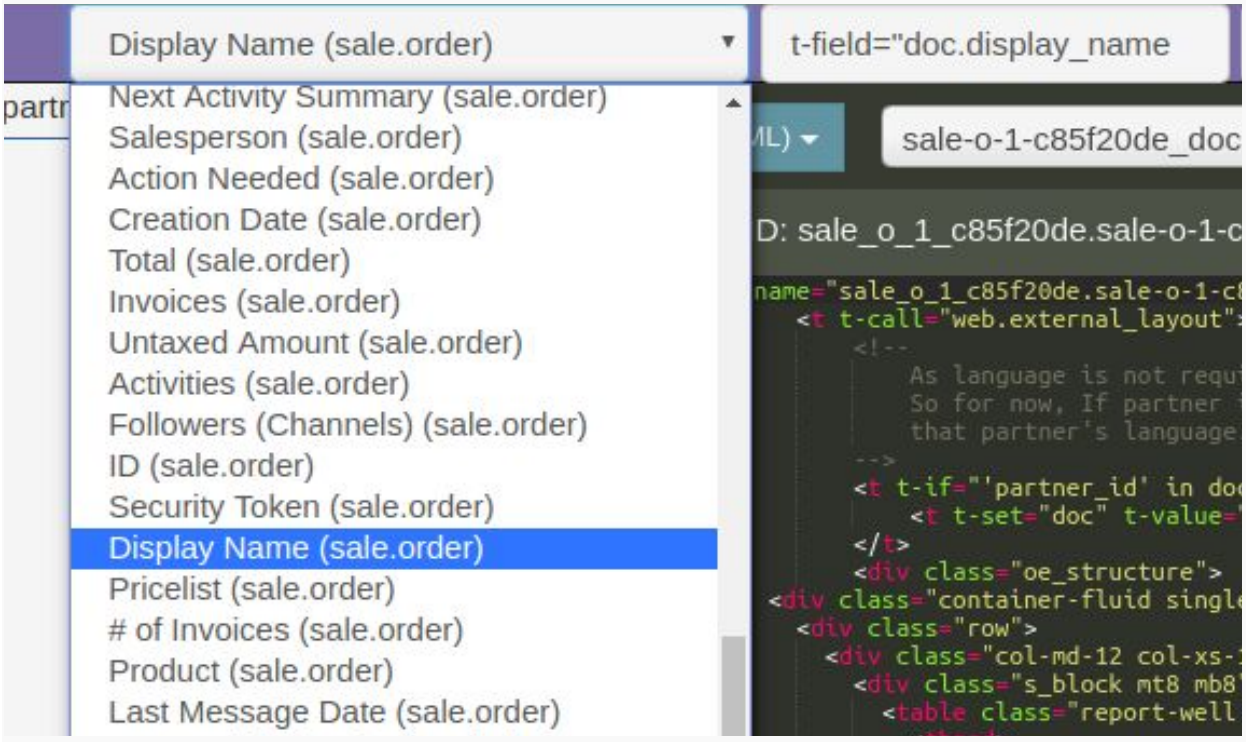


3. Select report from editor selection that suffix with “_document”,



4. User will see XML code of report in editor then user could make changes in code and save it. It will automatically reflect on report.



Also provide field generator create t-field expression that directly use in XML editor.

- Head to website Select model (table) field and it will display expression in beside textbox.