

**AO2 - Report Templates Design Guide**



[**Purpose**](#_mt4stydis1hl) **3**

[**Credentials**](#_sw3sxmo1qz3n) **3**

[**AO2 Report Templates**](#_wbje764hn6ew) **3**

[**System Tags**](#_2e12u8v9t3uj) **3**

[**Steps to modify a template for a School District**](#_hgl1tpgqxyq2) **4**

## Purpose

AO2 provides a set of reports that are available to the user out-of-the-box. These default report templates are defined by CSBA and made available to all School Districts.

This guide is created for CSBA Administrators who require the ability to modify the default report template for or a specific School District.

## Credentials

The following user’s have been granted access to modify the report templates in the QA environment:

1. User ID: ao2@avocadoworkflow.com

## AO2 Report Templates

|  |  |
| --- | --- |
| **Template Name** | **Report Name** |
| Agenda Outline Report | Agenda Outline Report |
| Board Packet Report | Board Packet |
| Board Packet Report 1 | Agenda Outline in Board Packet Report |
| Board Packet Report 2 | Single Item Report in Board Packet Report |
| Minutes Report | Minutes Report |
| Notes Report | Notes Report |
| Single Item report | Single Item Level Report |
| Workflow Report | Workflow Report |

## System Tags

The report templates include a set of system tags. System tags are reserved keywords that have special logic built-in to them. These usage of these tags is very important to the report generation functionality.

DO NOT MODIFY ANY OF THE FOLLOWING TAGS. DOING SO WILL MAKE THE TEMPLATE UNUSABLE:

1. <section\_begin>
2. <section\_end>
3. <list\_item\_begin>
4. <list\_item\_end>
5. <ao2\_motions\_table>
6. <ao2\_attendance\_table>
7. Text included with curly braces, eg. {Meeting.publishedTime}, {\_RUNTIME.PUBLISHER\_RUNTIME.DayOfWeek} etc.

## Steps to modify a template for a School District

1. Get the GUID for the School District
   1. Hint: The GUID is assigned when setting up the School District
   2. Richard should be able to provide a way to get this information
2. Login to Chrome using the credentials above.
3. In Drive, navigate to My Drive-> < $environment-subscriber-templates-> School District’s GUID
   1. The environments are as follows:
      1. Qa = Environment for QA
      2. Sandbox = Environment for demos
      3. Prod = Environment for Pilot
4. Open the template you want to modify
5. Modify the text as needed, including
   1. Logos
   2. Basic formatting (font, size, bold, italics, underline, text alignment) for labels, eg. “Open Session:”, “Published:“, etc.
6. Your changes to the templates will automatically be saved.
7. To test your changes:
   1. Log in to the School District
   2. Run the report that was just modified.