



Enrole Templates Using Informer

Create and Customize Your Output

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Agenda

- What are Templates and Letterhead?
- Parts of a Template Report
- Templates and Letterhead Demo



Templates are a type of Report



- Highly formatted output, made by you, that can be filled out from Informer data
- Examples:
 - Invoice
 - Certificate of Completion
 - Instructor Agreement
 - Order Confirmation

The image shows two overlapping document templates. The top one is an 'Invoice' from Entrinsik, Inc. for A.Z. Technology Inc. It includes a table with columns for Order, Description, and Total. The bottom one is a 'Certificate of Completion' awarded to Philip Johnson for 'Introduction to Guitar' on September 11, 2025, signed by Robby Brooks.

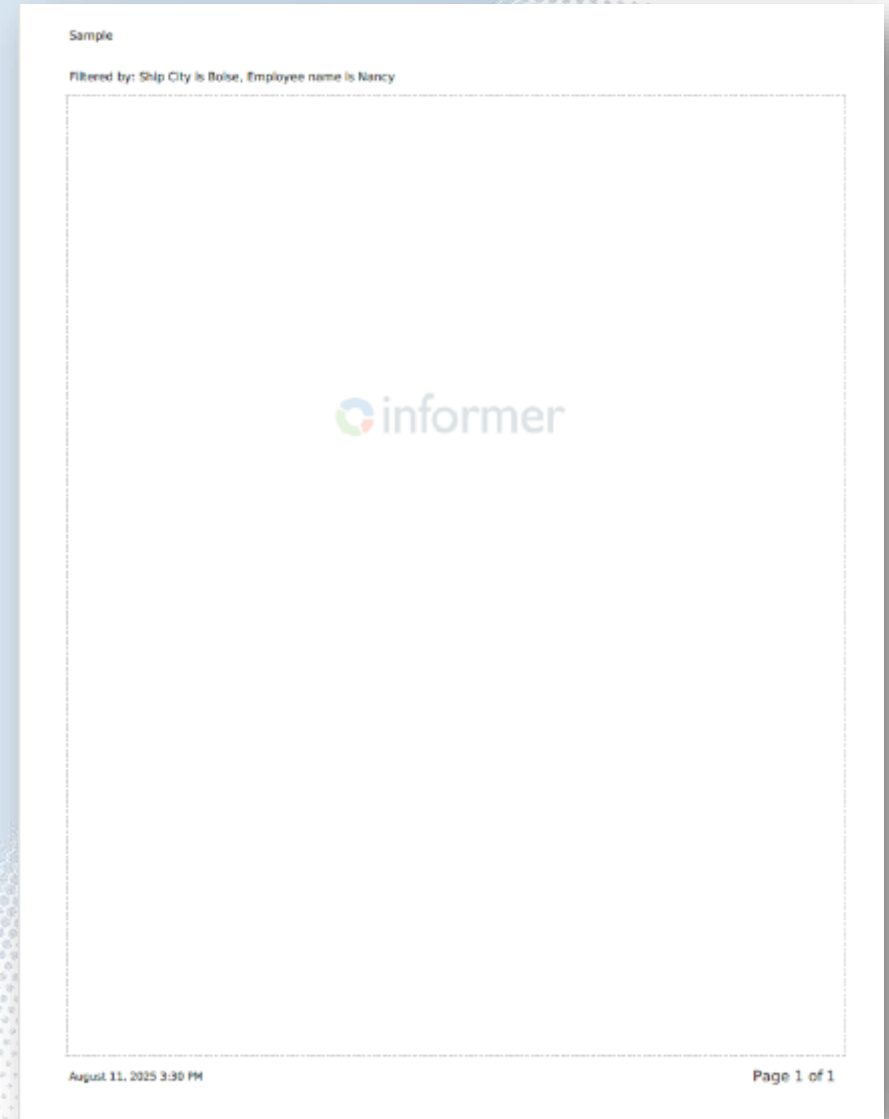
| Order | Description | Total |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| D9046A1 | Julie Cox Course: Excel Basics Session: 255U-PDEXCEL-020 Date: 05/19/2025 - 08/01/2025 Time: 9:00 AM - 11:30 AM | \$200.00 |
| ES10A49 | Julie Cox Course: English as a Second Language (ESL) Conversation Level 1 Session: 255P-ESL071-001 Date: 02/04/2025 - 02/07/2025 Time: 9:00 AM - 5:00 PM | \$290.00 |
| ES10A4A | Julie Cox Course: English as a Second Language (ESL) Conversation Level 1 Session: 255P-ESL071-001-B/DOK Date: 02/04/2025 - 02/07/2025 Time: 9:00 AM - 5:00 PM | \$5.00 |
| 1128DE81 | Bob Dylan Course: CPR & Basic Life Support Session: 255P-BLS-CT109 Date: 09/18/2025 - 09/18/2025 Time: 12:00 PM - 3:00 PM | \$0.00 |
| Subtotal: | | \$500.00 |
| Credits: | | (\$270.00) |
| Balance Due: | | \$230.00 |

The image shows an 'Order Confirmation' from Entrinsik, Inc. for a course on February 4, 2025. It includes a table with columns for Fee Summary, Fee, and Amount. The total fee is \$0.00.

| Fee Summary | Fee | Amount |
|-----------------------------------------------------------------------------|--------|--------|
| Every day, starting on 02/05/25 and ending on 02/05/25 9:00 AM - 5:00 PM | | |
| Dress in loose clothing for moving around. | | |
| Fee: | \$0.00 | |

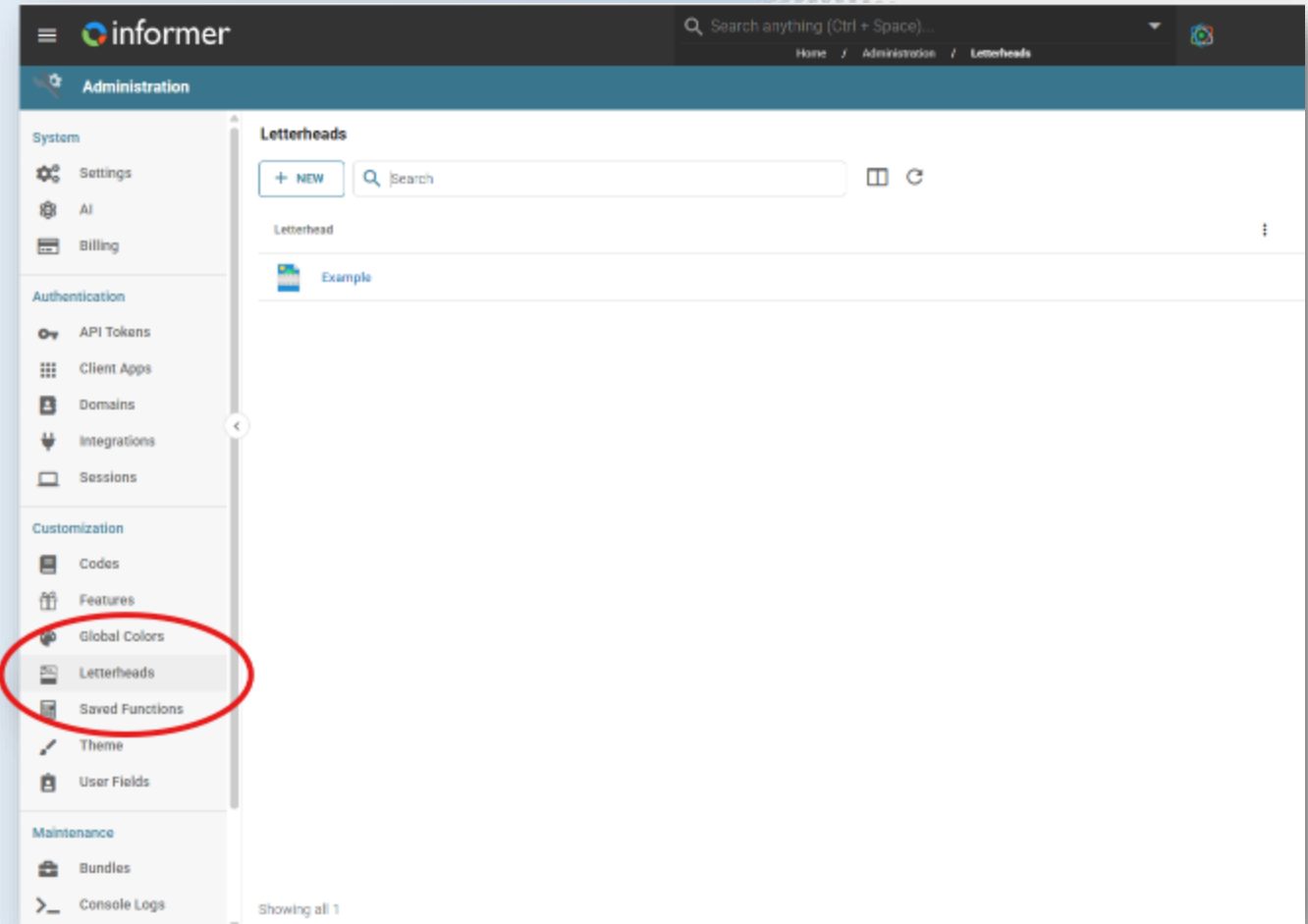
Letterhead is a wrapper around that document

- A PDF wrapper for Templates & Exports that gives access to variables such as the user, date, current page number, etc.
- Sections:
 - Header
 - Footer
 - Watermark
 - Font
 - Page Size
 - Margins
 - Orientation



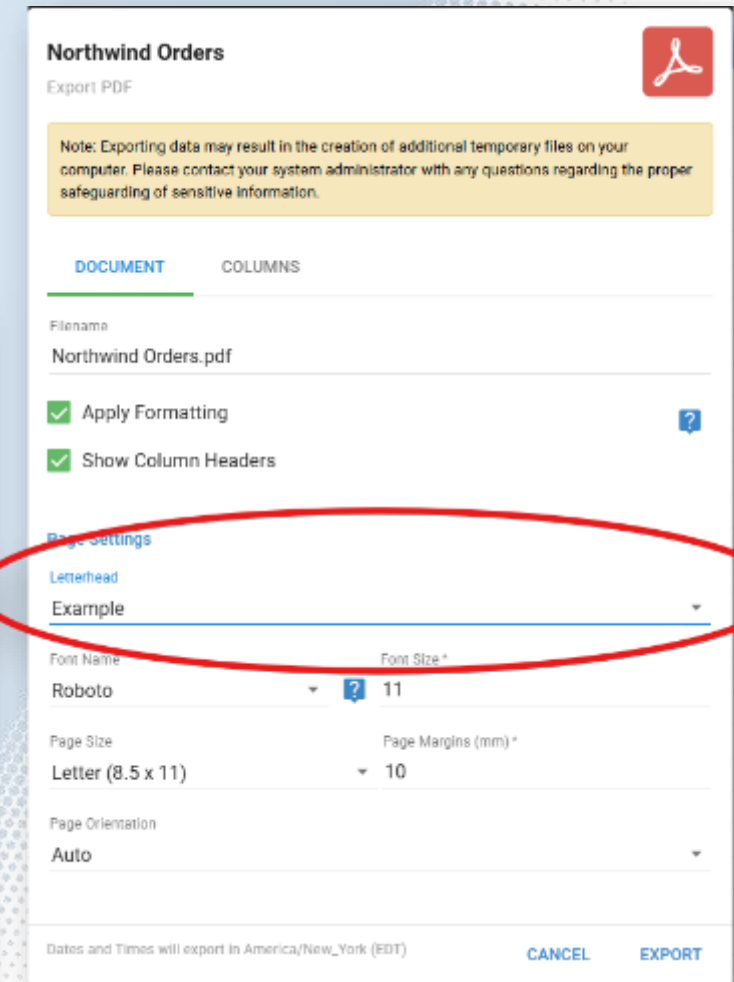
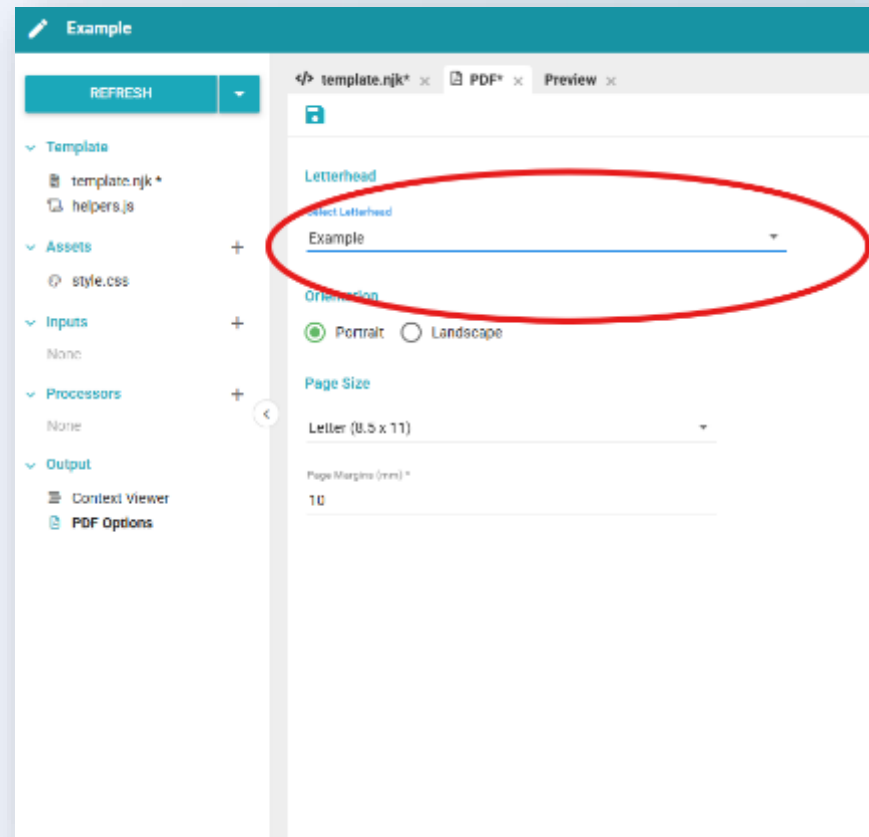
Letterhead

- Go to Administration / Letterheads
- Can be set as default



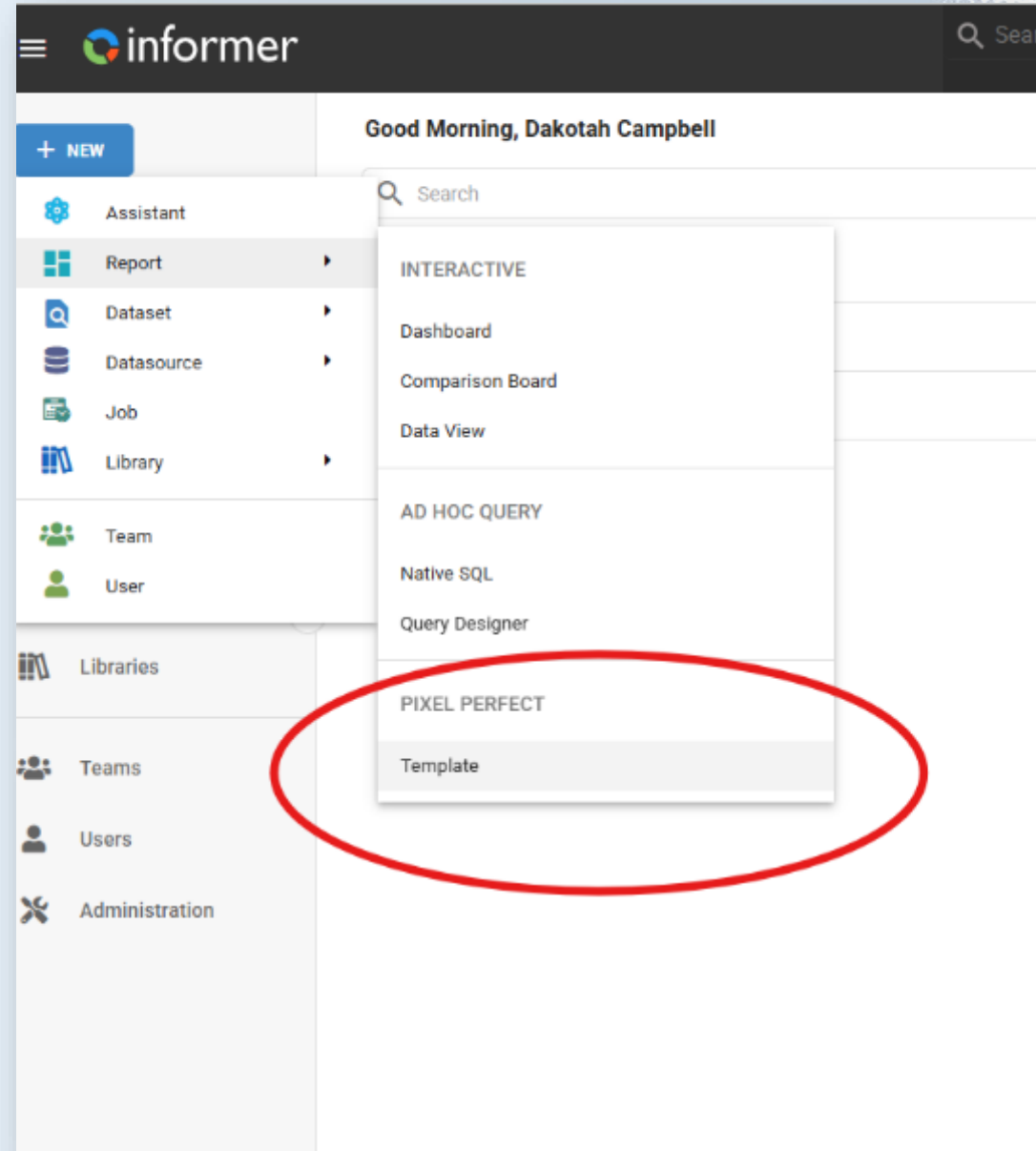
Letterhead can be used for export

- Letterhead is a PDF option for:
 - Dataset export
 - Ad hoc query
 - Data view export
 - Pivot export
 - Templates



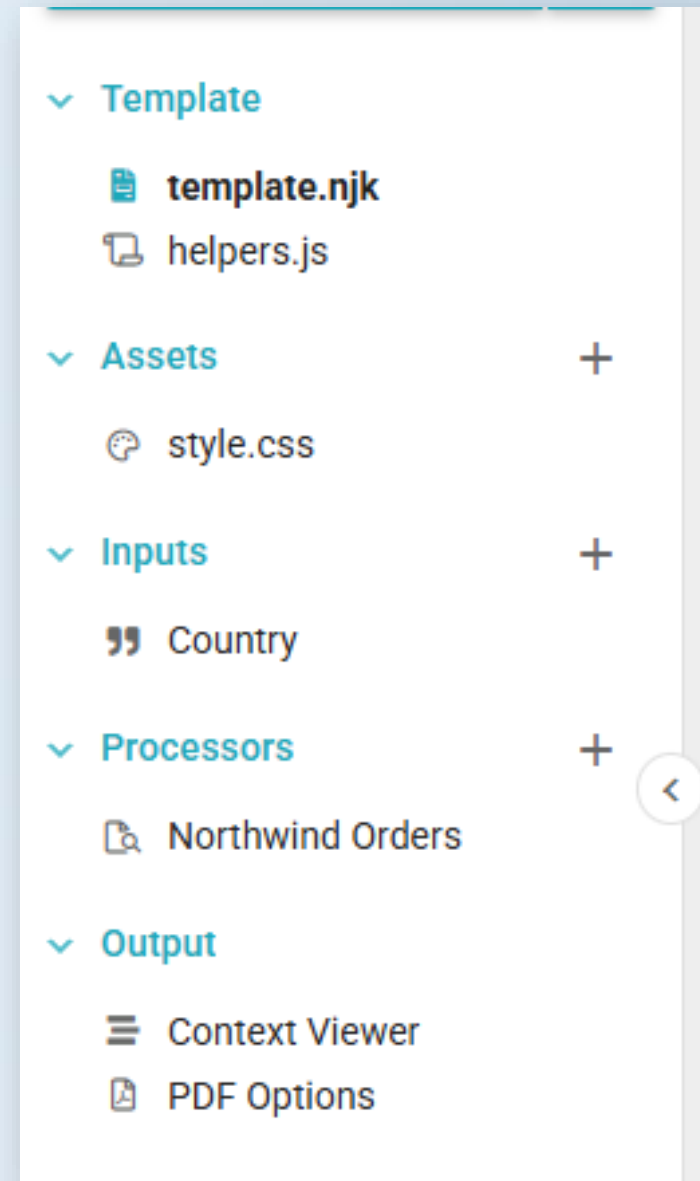
Template Report

- New Report → Template



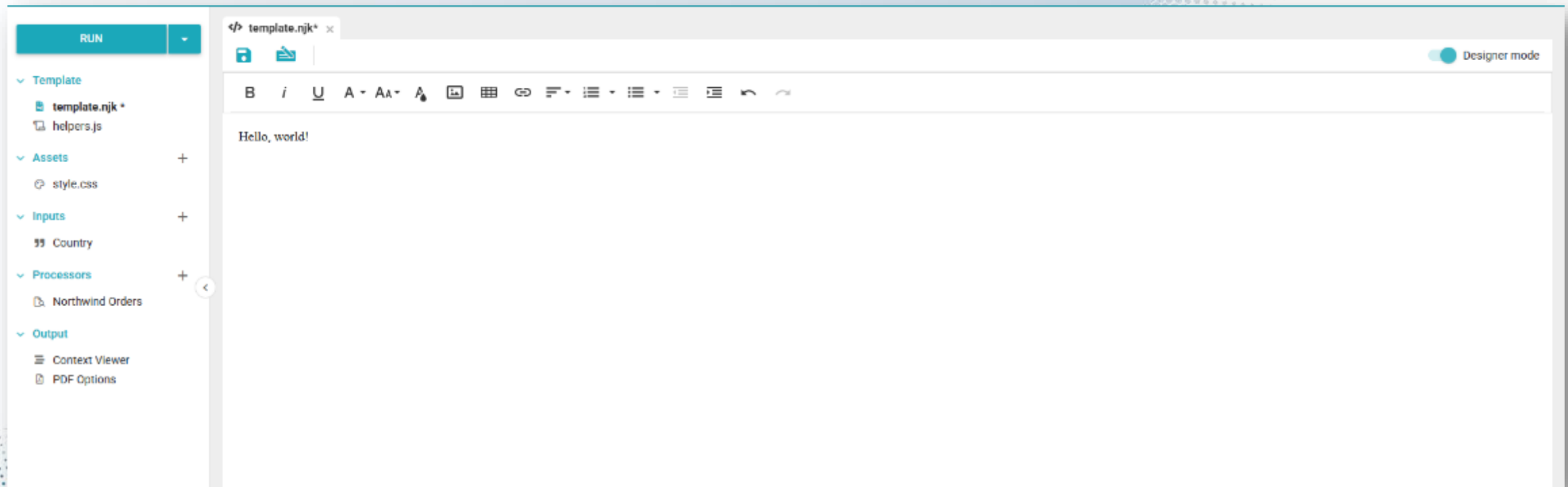
Template Report: Editor

- 5 sections to the editor
 - Template
 - Assets (optional)
 - Inputs (optional)
 - Processors (optional)
 - Output



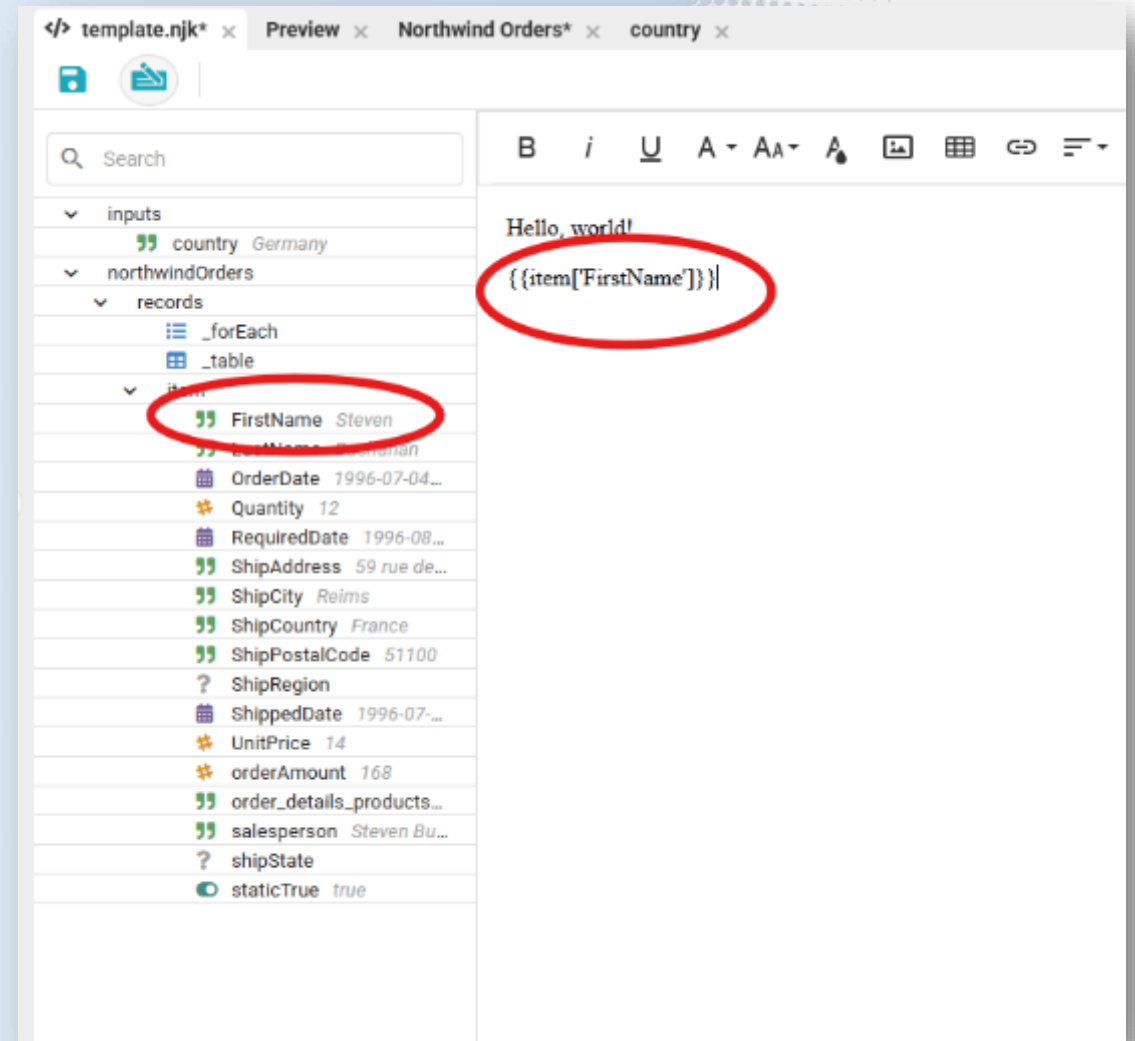
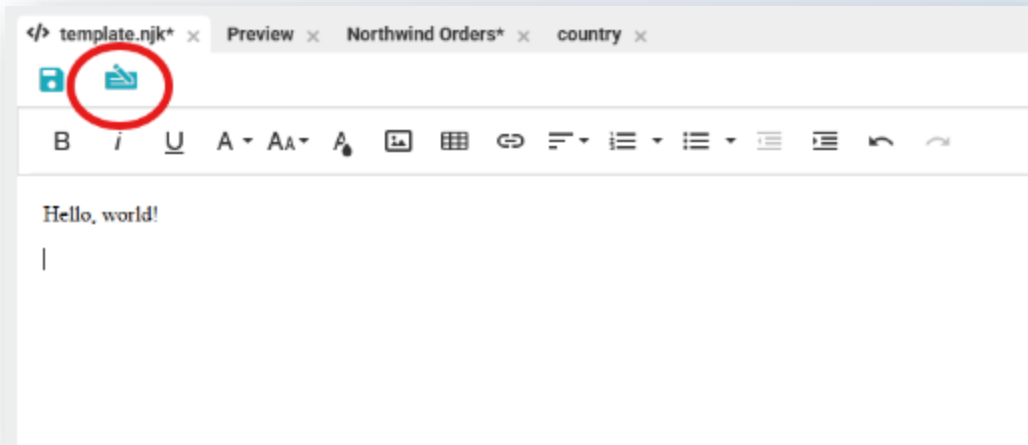
Template Report: Editor

- Template is the main body of the document
 - WYSIWYG editor “What You See Is What You Get”
 - JavaScript helper functions are great for custom formatting



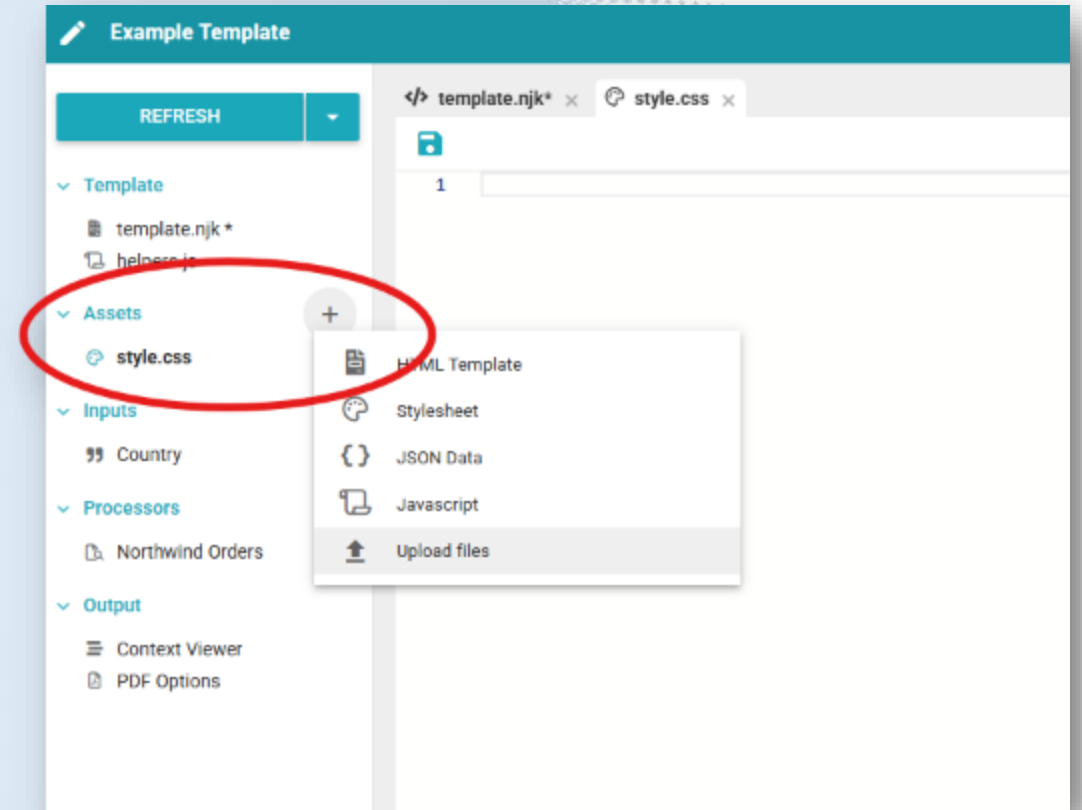
Template Report: Editor

- Template is the main body of the document
 - Nunjucks templating engine used to fill in variables



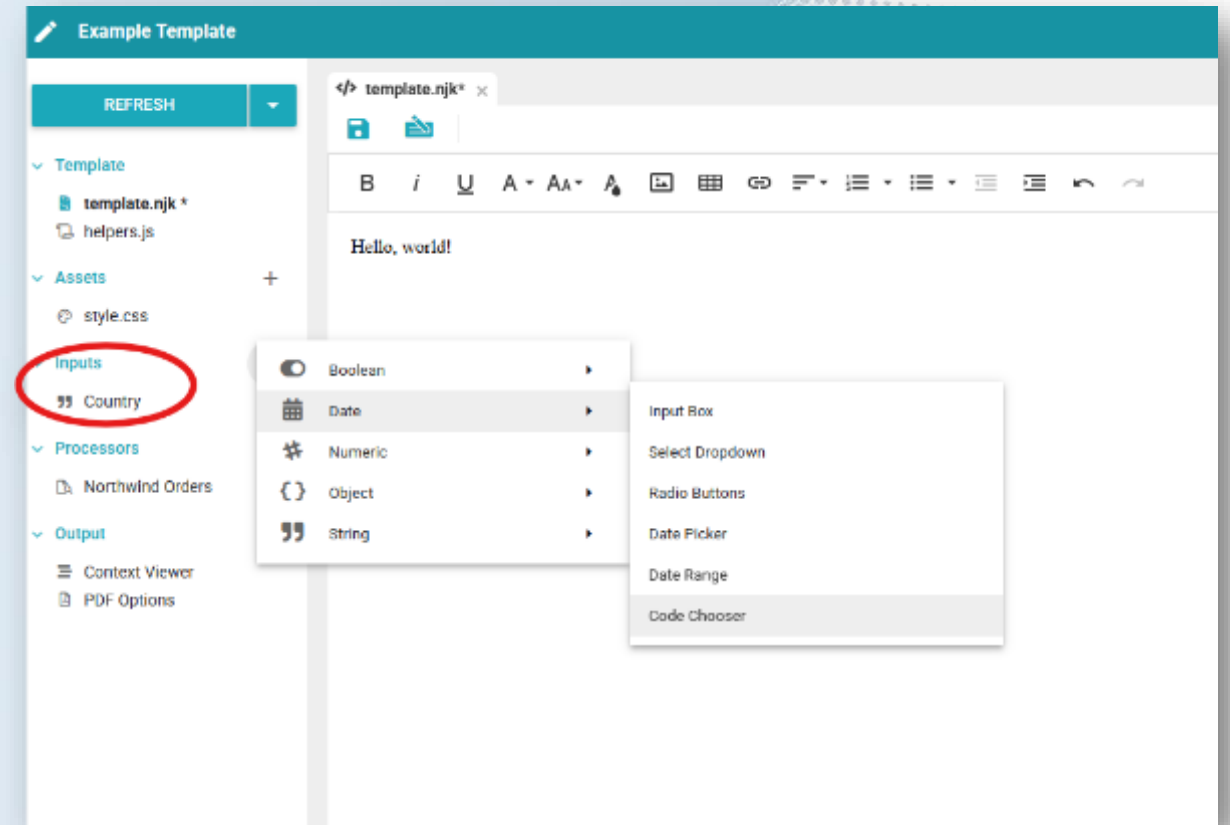
Template Report: Assets

- Assets are files that are loaded into the Template for visual purposes
 - Stylesheets
 - Logos
 - Custom headers
 - Custom footers



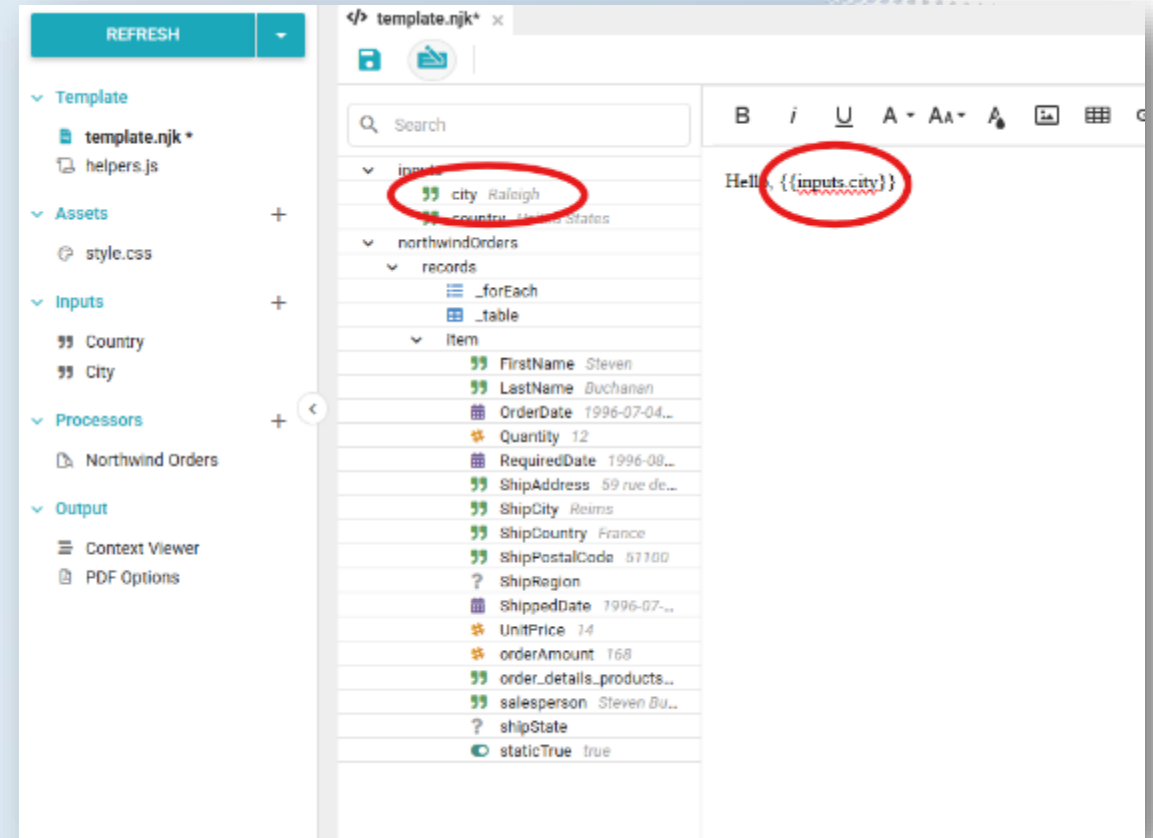
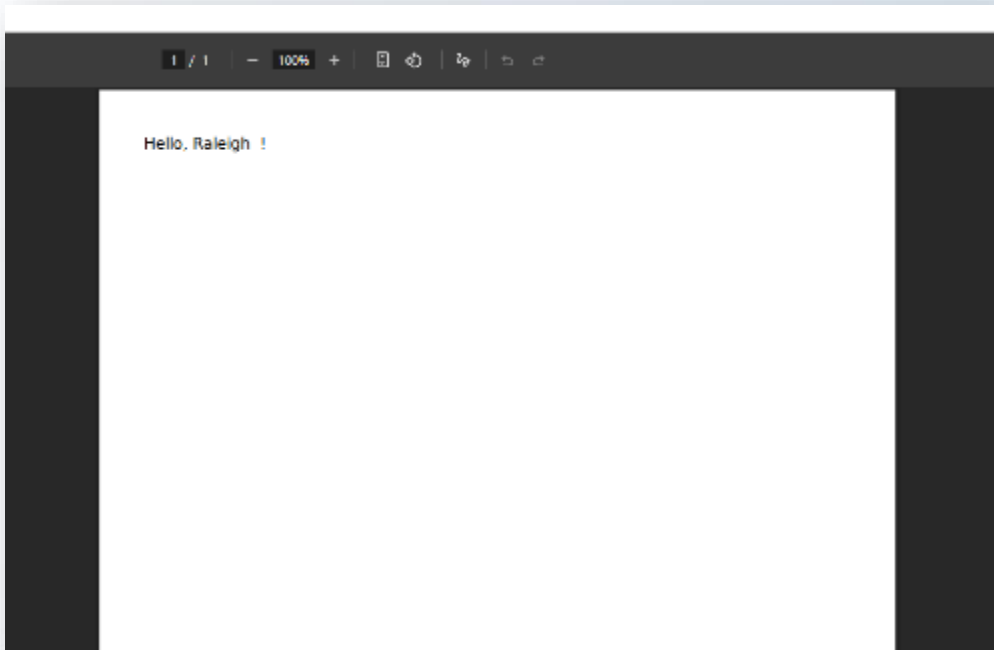
Template Report: Inputs

- Inputs allow runtime values to change the output
 - Use directly - `{{ inputs.city }}`
 - Pass into a Query - Parameter or Dataset filter
 - Use in a script



Template Report: Inputs

- Use Directly in the Template
 - `{{ inputs.city }}`



Template Report: Processors

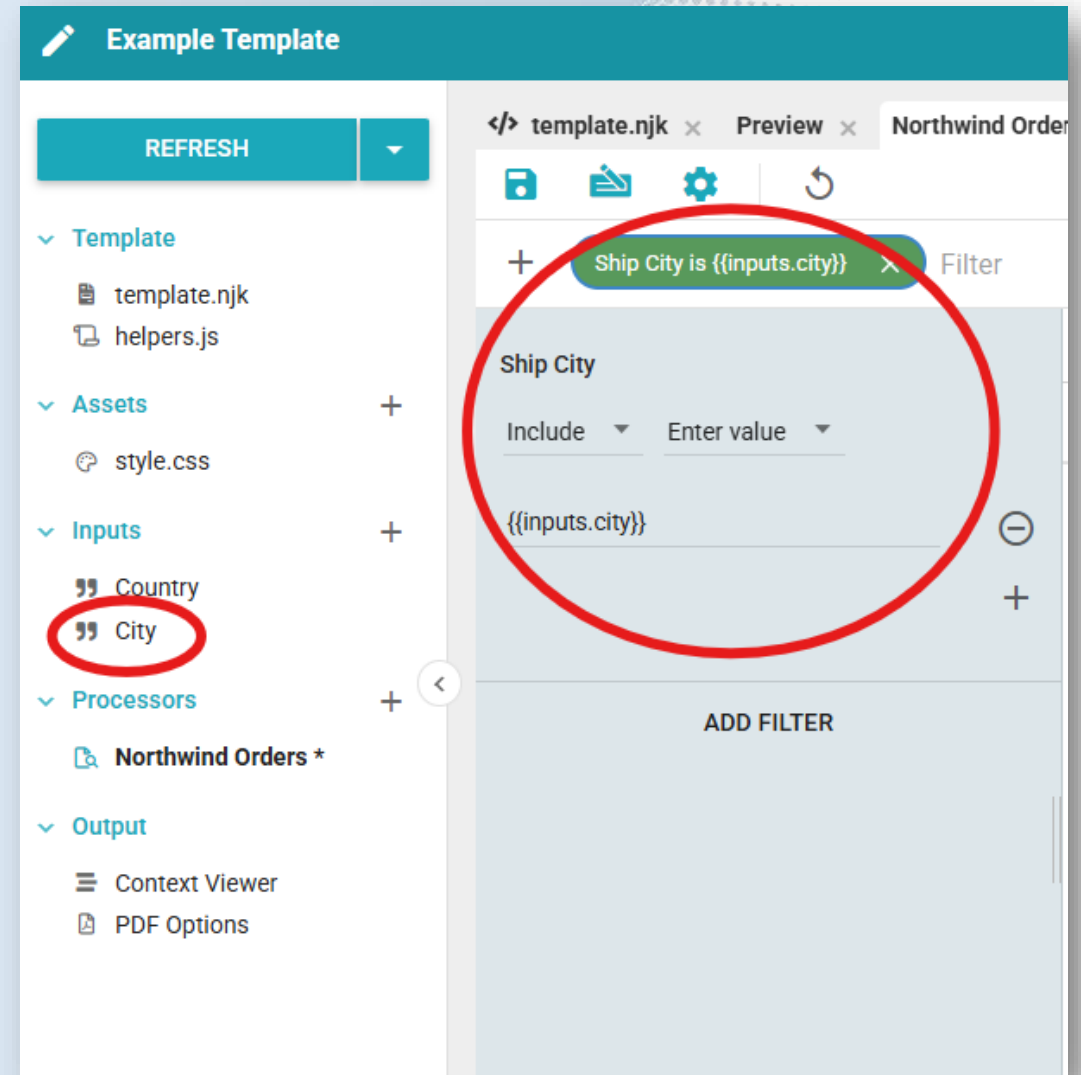
- Processors bring Informer data into the Template
 - Datasets
 - Ad hoc Queries
 - Power Script
 - Current User

The screenshot displays a web application interface for a template report. On the left, a sidebar contains a 'Processors' section with a red circle around 'Northwind Orders *'. A dropdown menu is open, listing various processor types: AI Assistant Prompt, Ad hoc Query, Current User, Dataset, Native Elasticsearch Query, Native SQL Query, and Power Script. The main area shows a table of order data with columns for Ship Address, Ship City, Ship Region, and Ship Postal Code.

| Ship Address | Ship City | Ship Region | Ship Postal Code |
|--------------------|----------------|-------------|------------------|
| 59 rue de l'Abbaye | Reims | | 51100 |
| 59 rue de l'Abbaye | Reims | | 51100 |
| 59 rue de l'Abbaye | Reims | | 51100 |
| Luisenstr. 48 | Münster | | 44087 |
| Luisenstr. 48 | Münster | | 44087 |
| | Rio de Janeiro | RJ | 05454-876 |
| | Rio de Janeiro | RJ | 05454-876 |
| | Rio de Janeiro | RJ | 05454-876 |
| | Lyon | | 69004 |
| | Lyon | | 69004 |
| | Lyon | | 69004 |
| | Charleroi | | B-6000 |
| | Charleroi | | B-6000 |
| | Charleroi | | B-6000 |
| | Rio de Janeiro | RJ | 05454-876 |
| Rua do Paço, 67 | Rio de Janeiro | RJ | 05454-876 |
| Rua do Paço, 67 | Rio de Janeiro | RJ | 05454-876 |

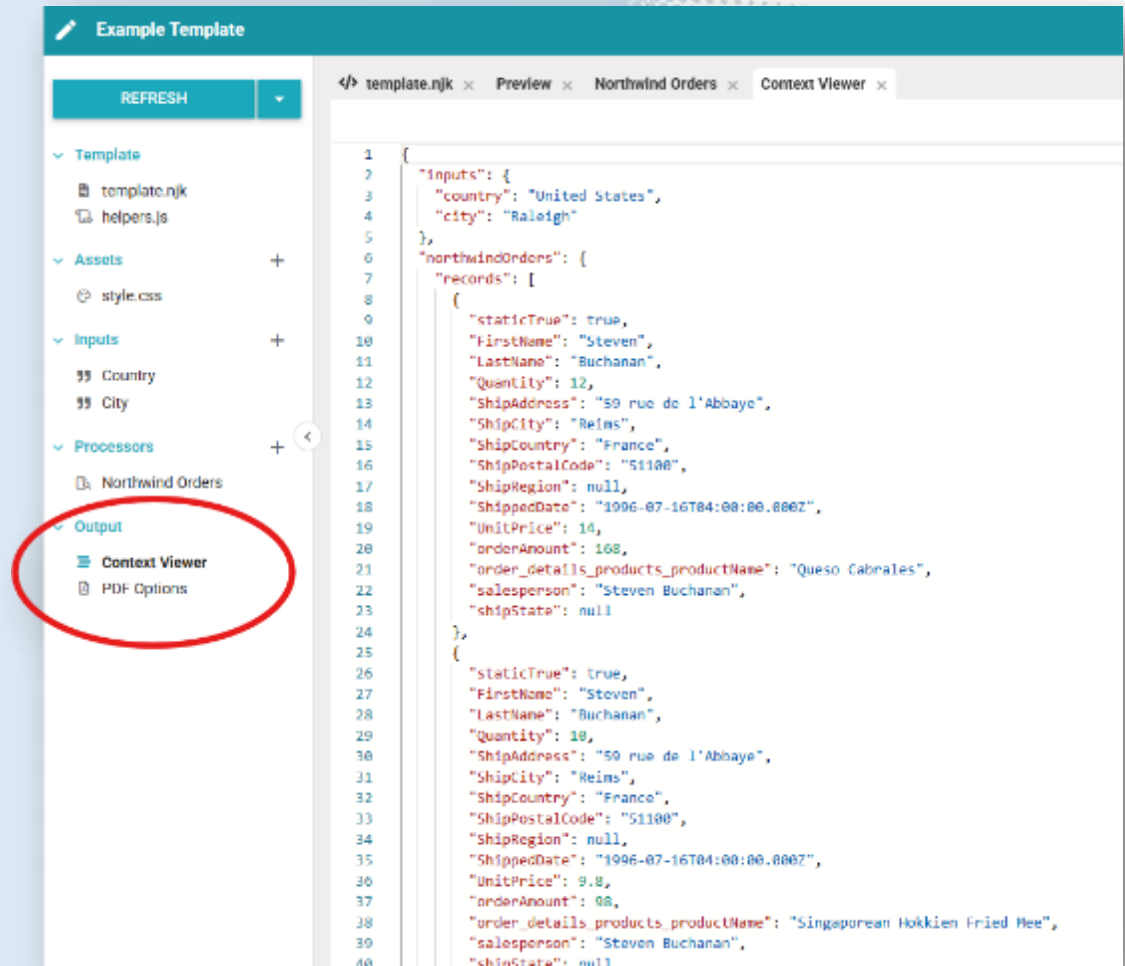
Template Report: Processors

- Use Inputs to pass in parameters and filters, or to use in a Power Script



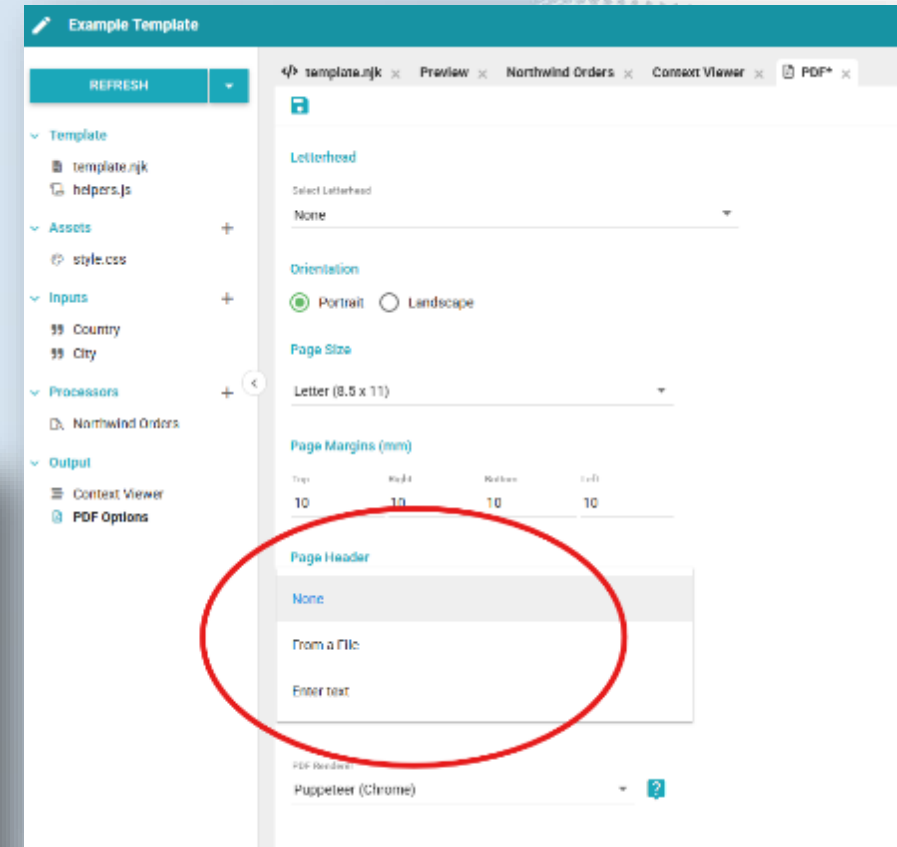
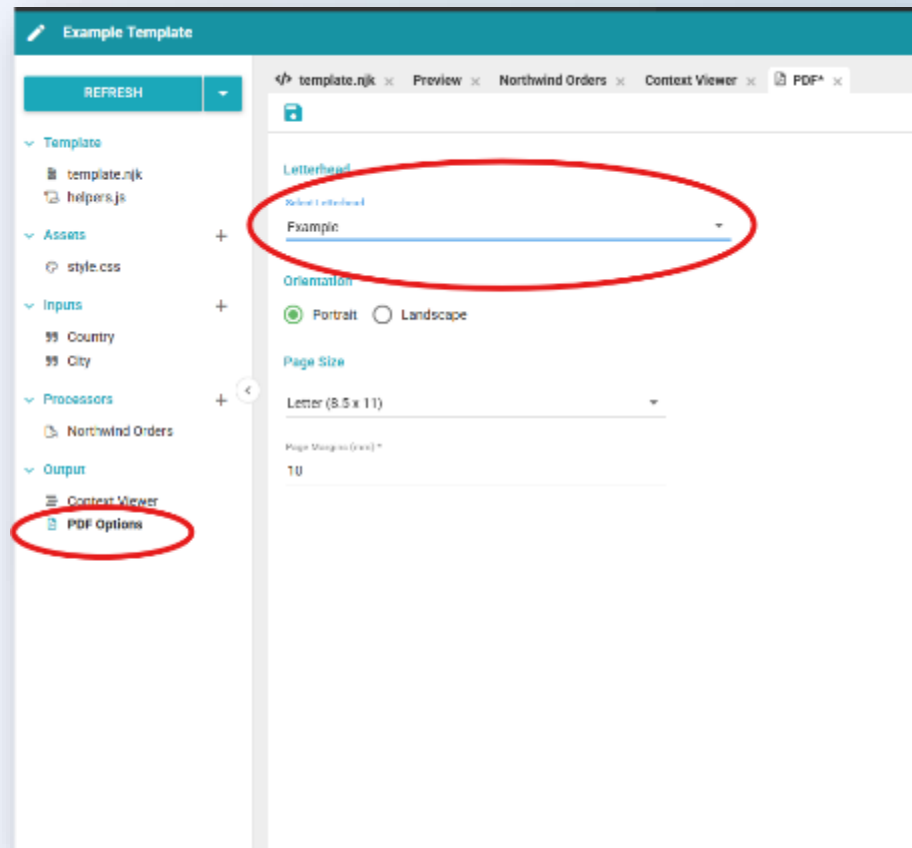
Template Report: Output

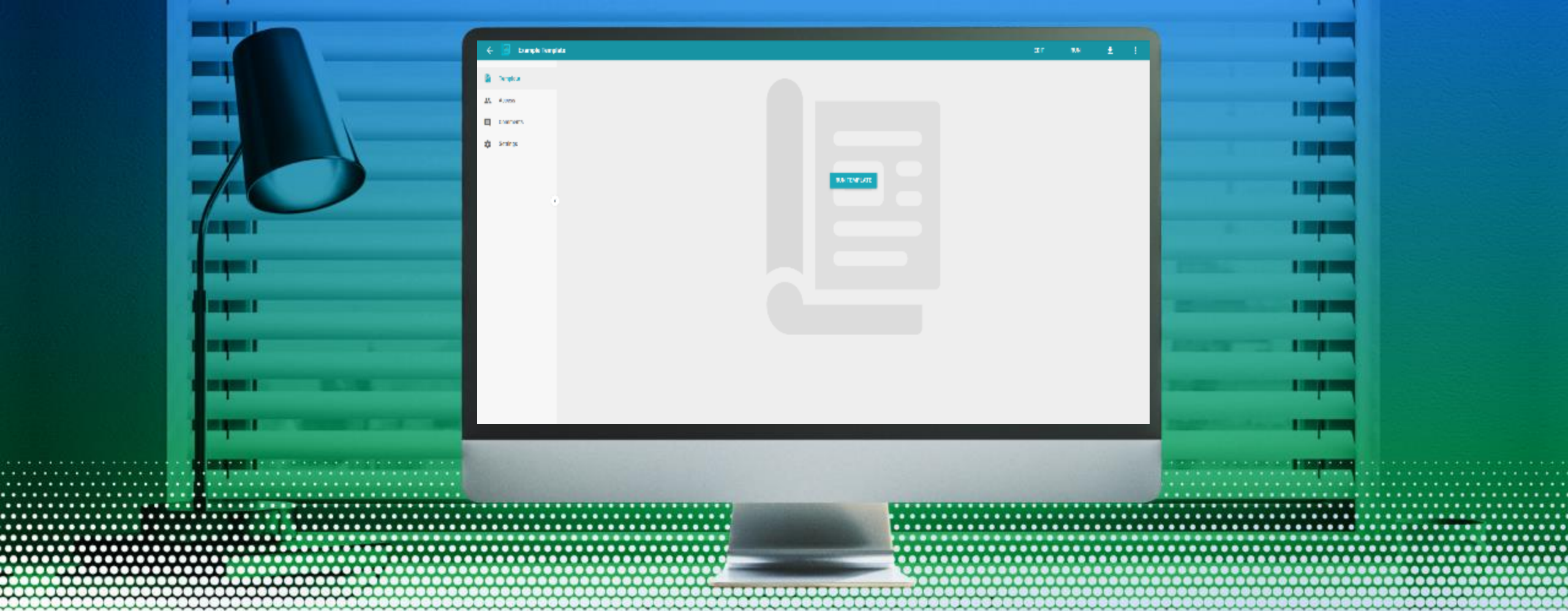
- Context Viewer is the result of all the Inputs and Processors
- The result is sent into Nunjucks template
- Any variables here can be referenced in the Template



Template Report: Output

- PDF allows customization of the output
 - Choose a Letterhead
 - Or choose Assets to be headers and footers





Templates and Letterheads Demo



Thank you

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