



Templates and Letterhead

Create and customize your output

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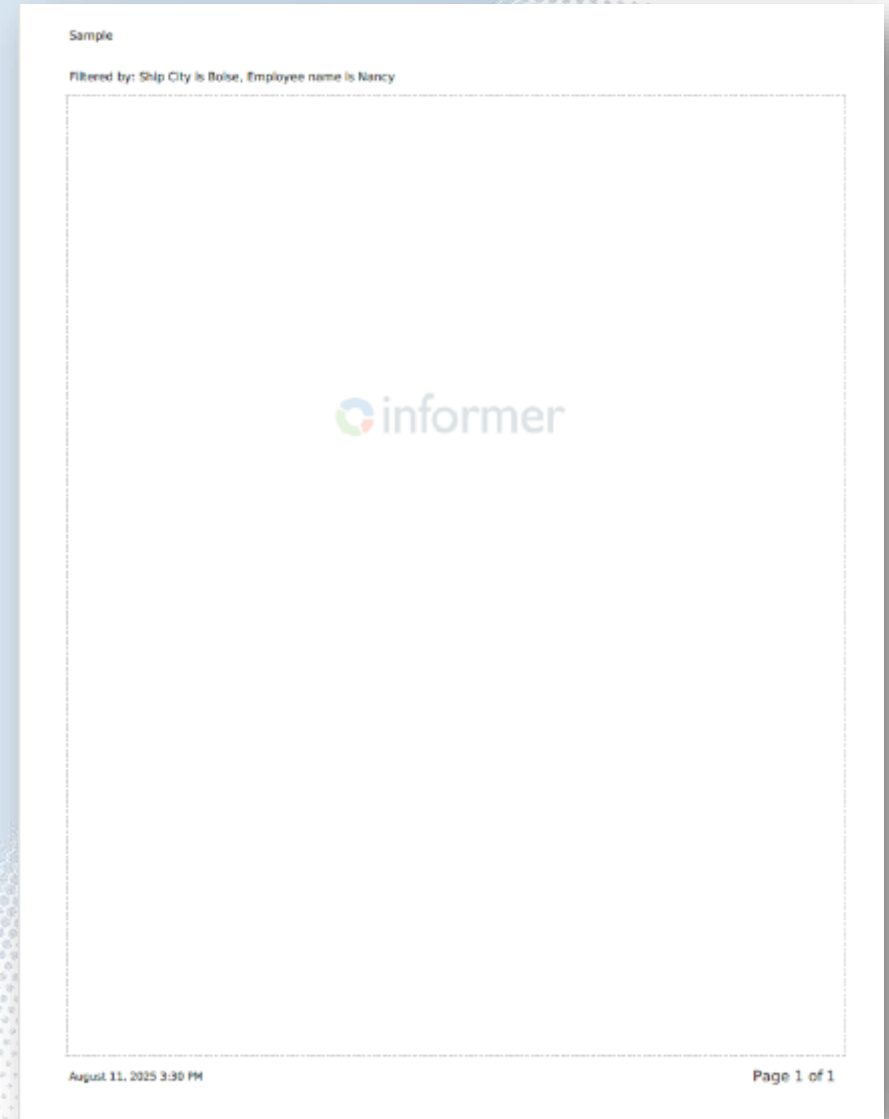
Agenda

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



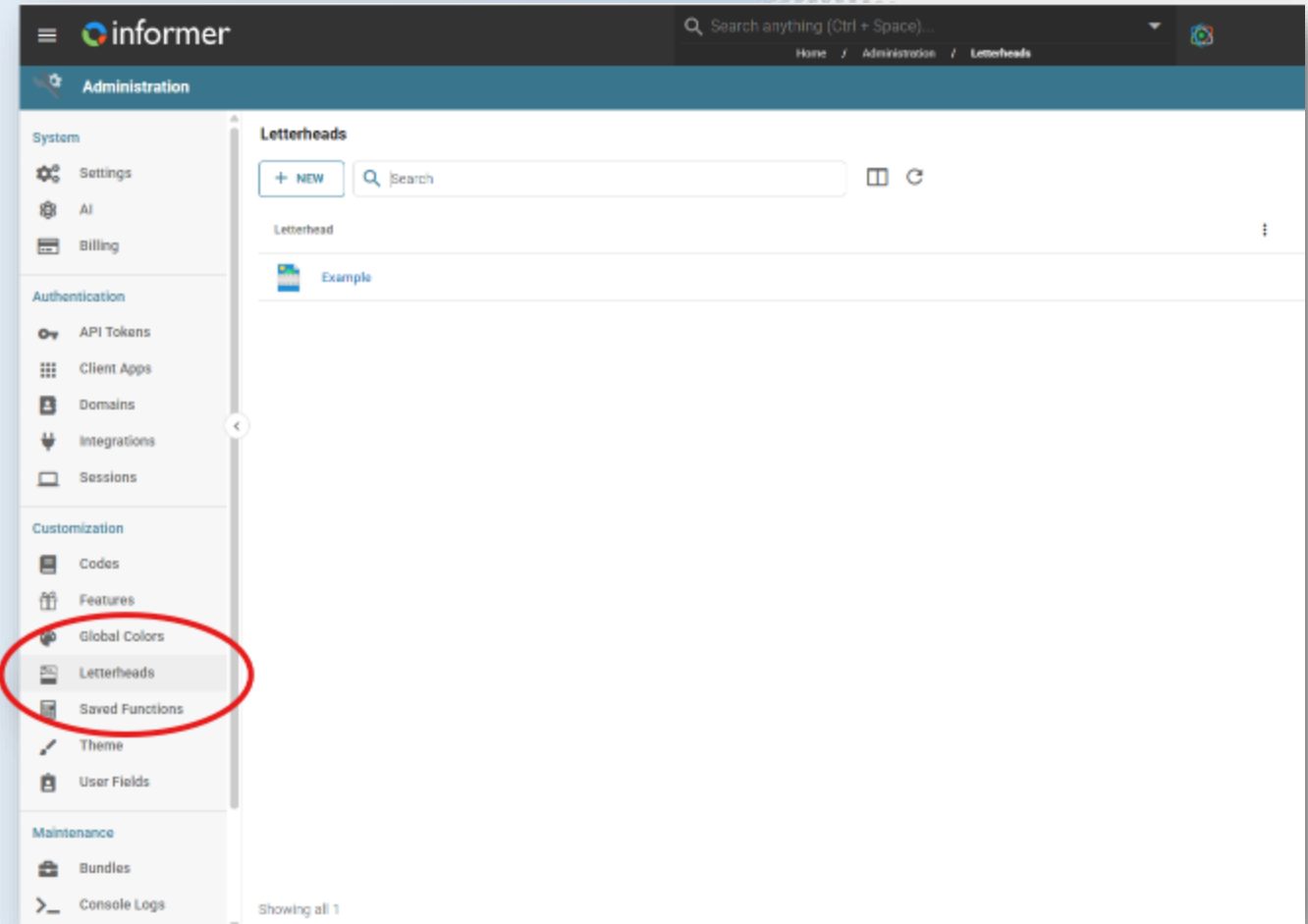
Letterhead is a wrapper around that document

- 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

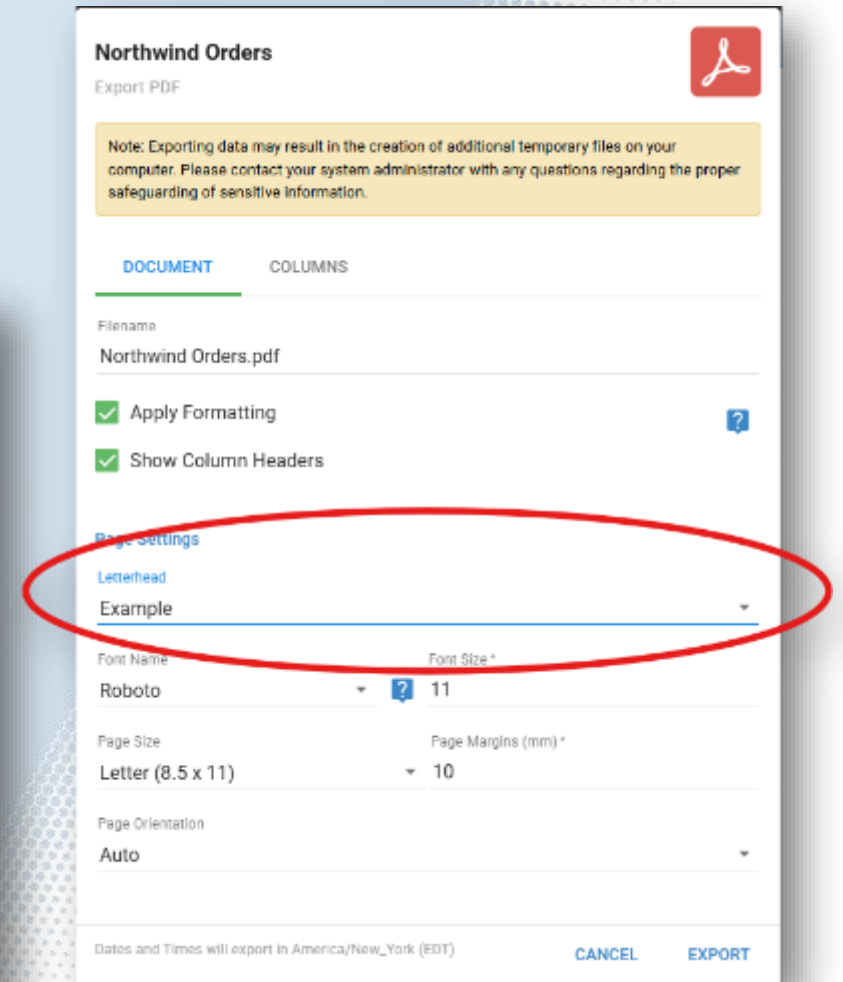
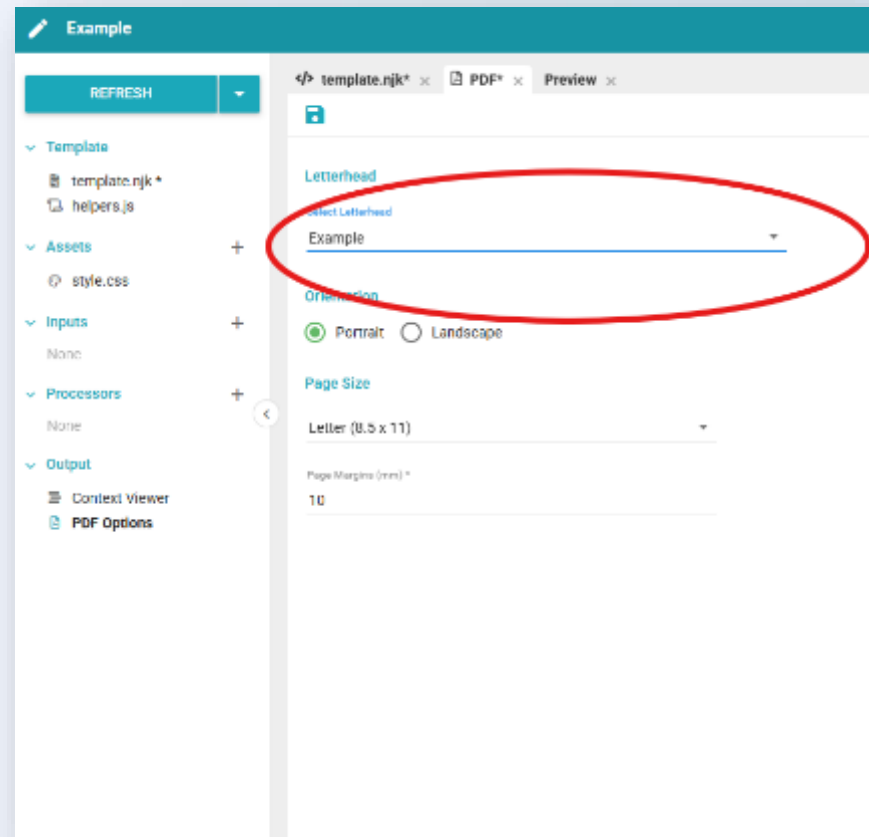
- Go to Administration / Letterheads
- Can be set as default

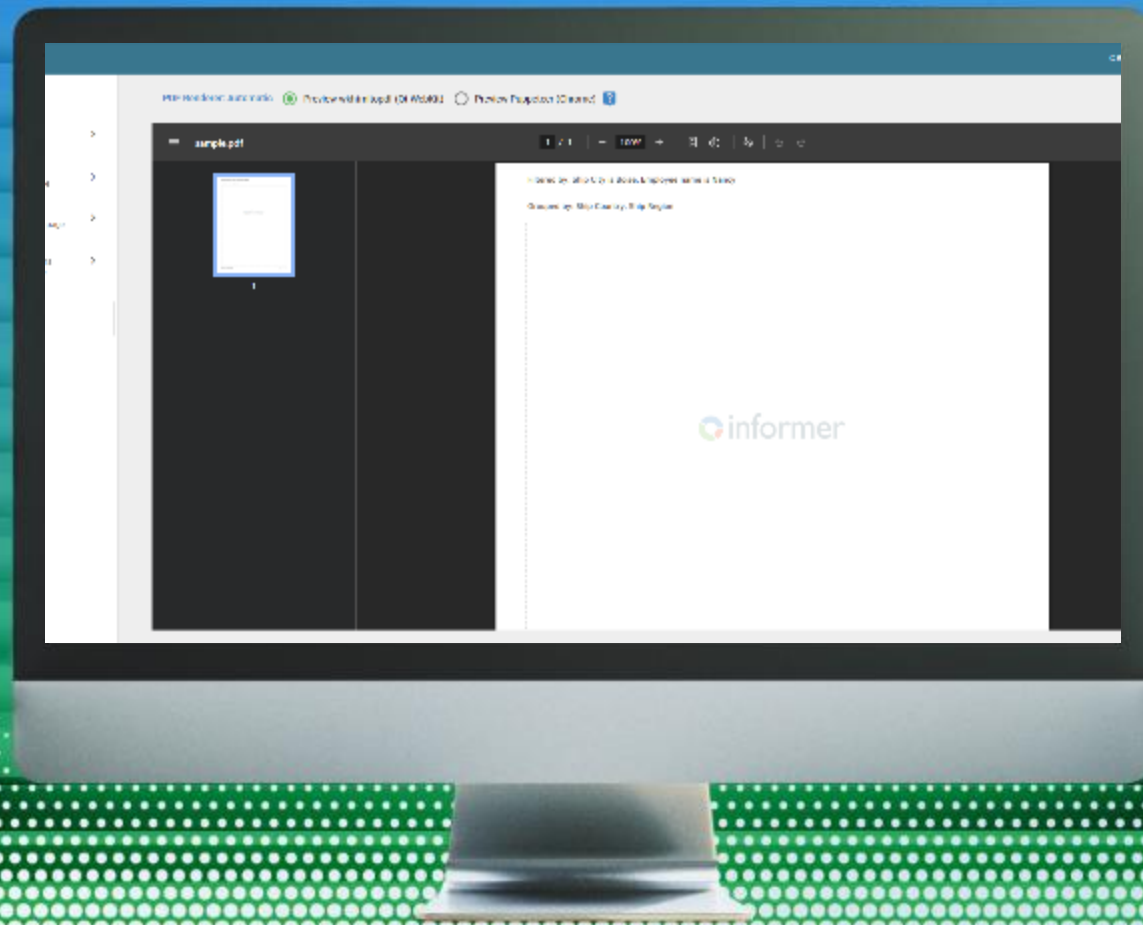


Letterhead can be used for export

Letterhead is a PDF option for:

- Dataset export
- Ad hoc query
- Data view export
- Pivot export
- Templates

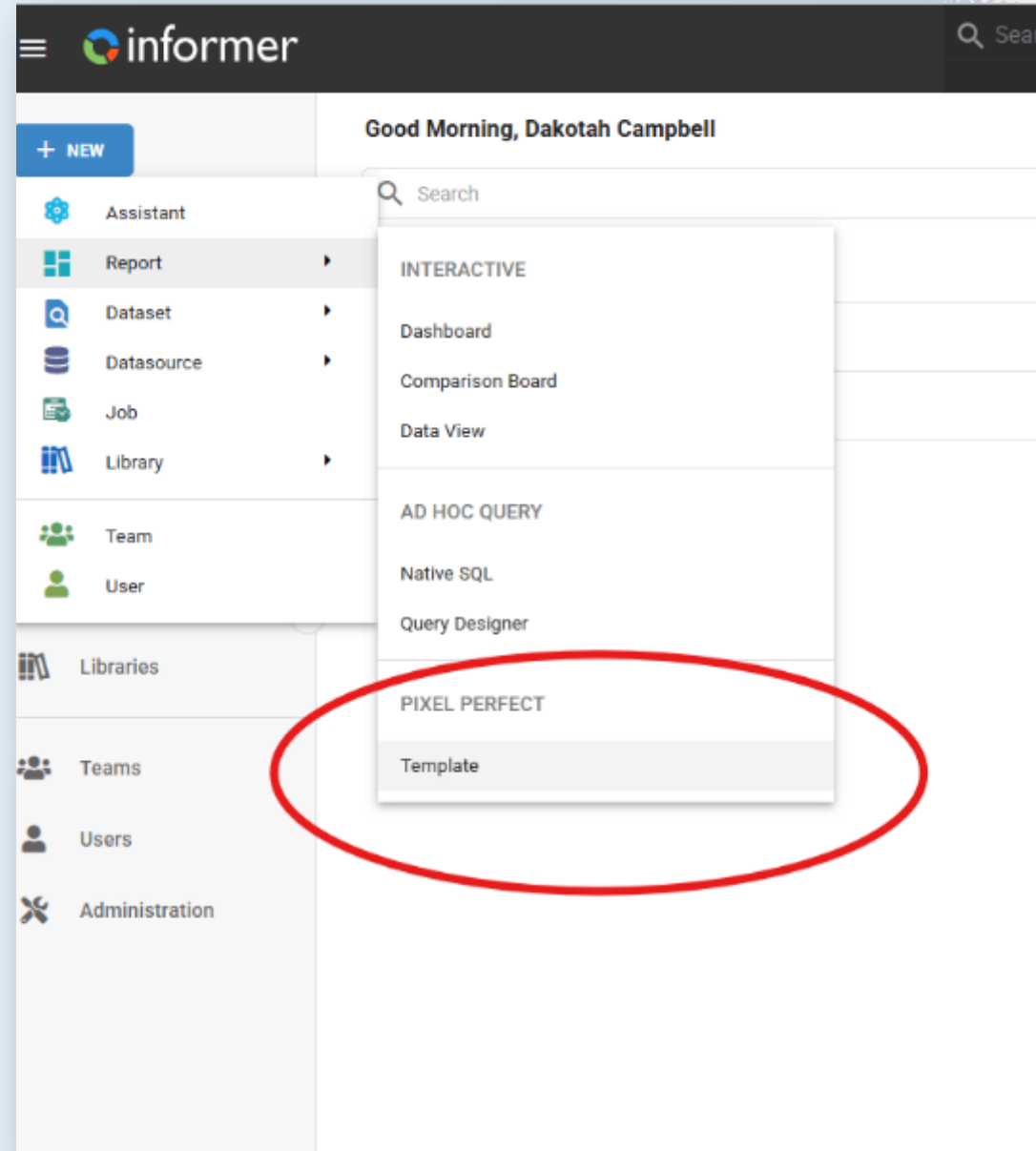




Letterhead Demo

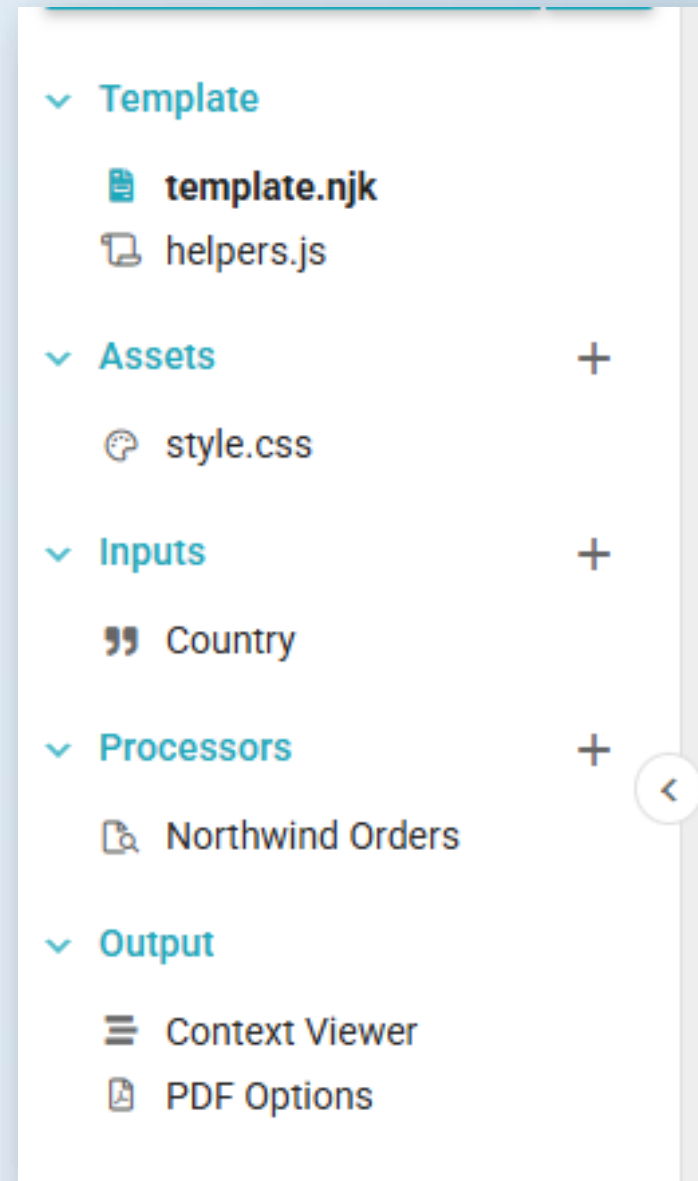
Template Report

- New Report → Template



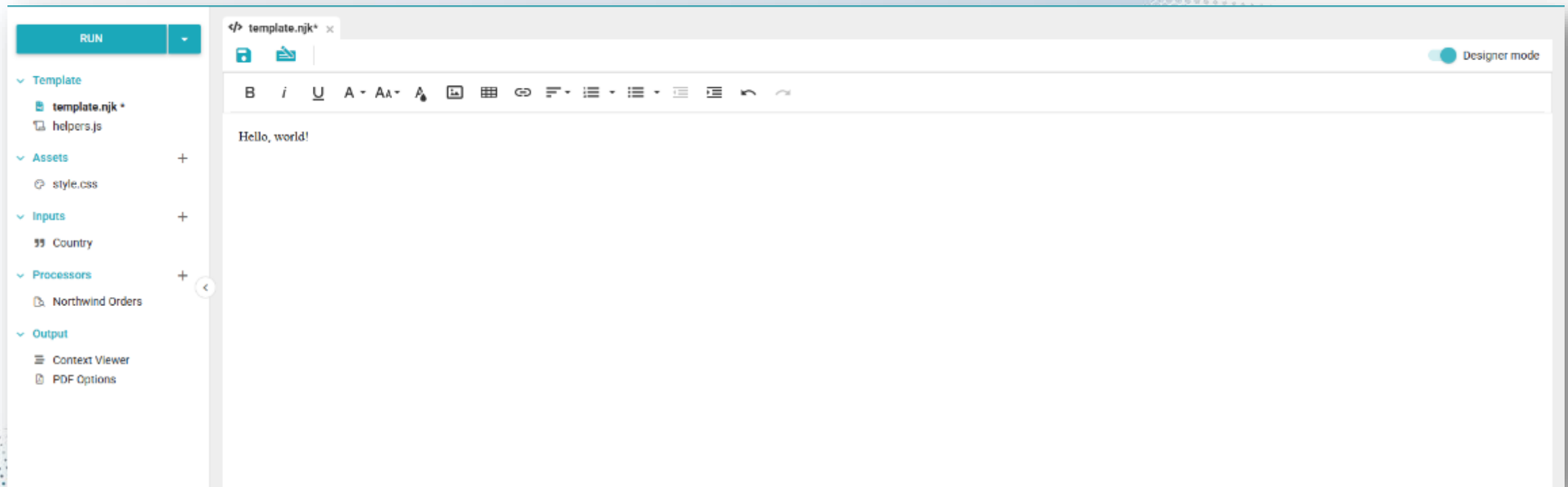
Template Report: Editor

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



Template Report: Editor

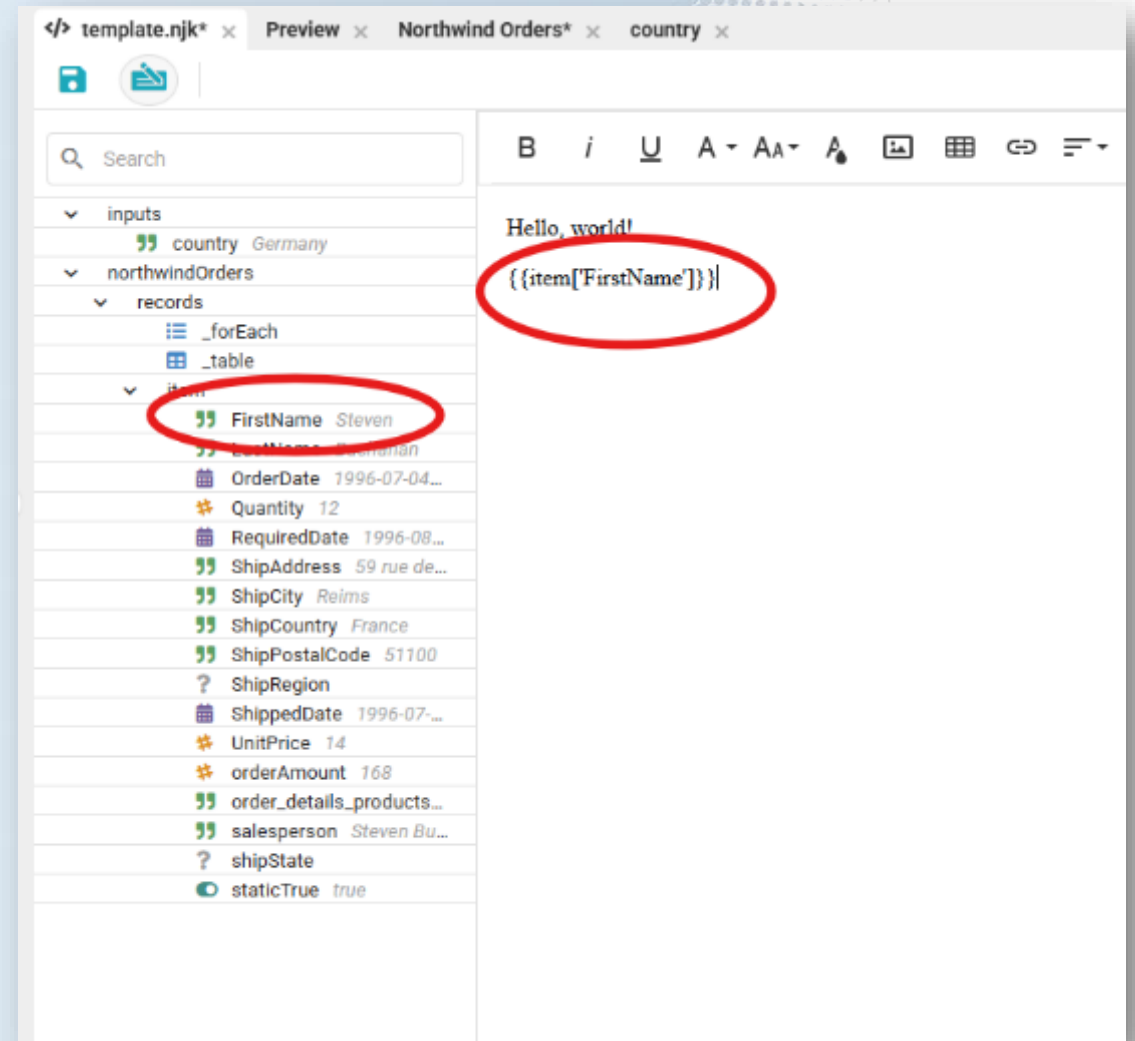
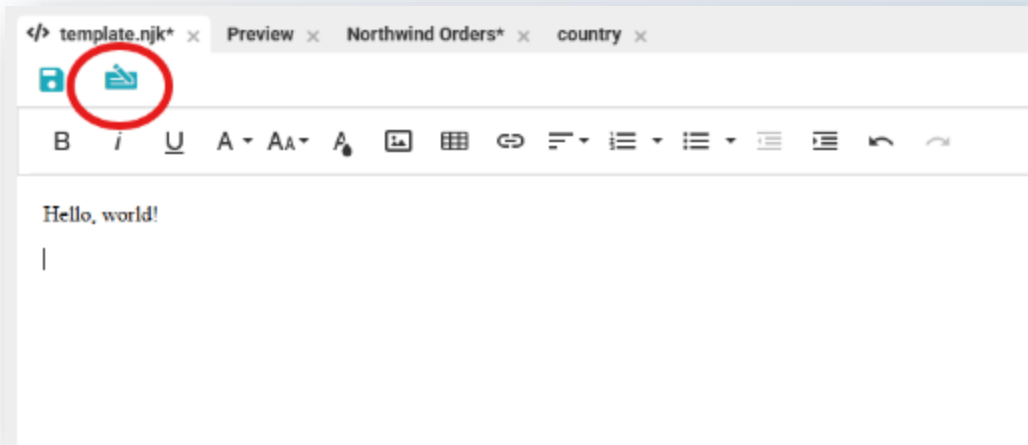
- Template is the main body of the document
 - WYSIWYG editor “What You See Is What You Get”
 - JavaScript helper functions are great for custom formatting



Template Report: Editor

Template is the main body of the document

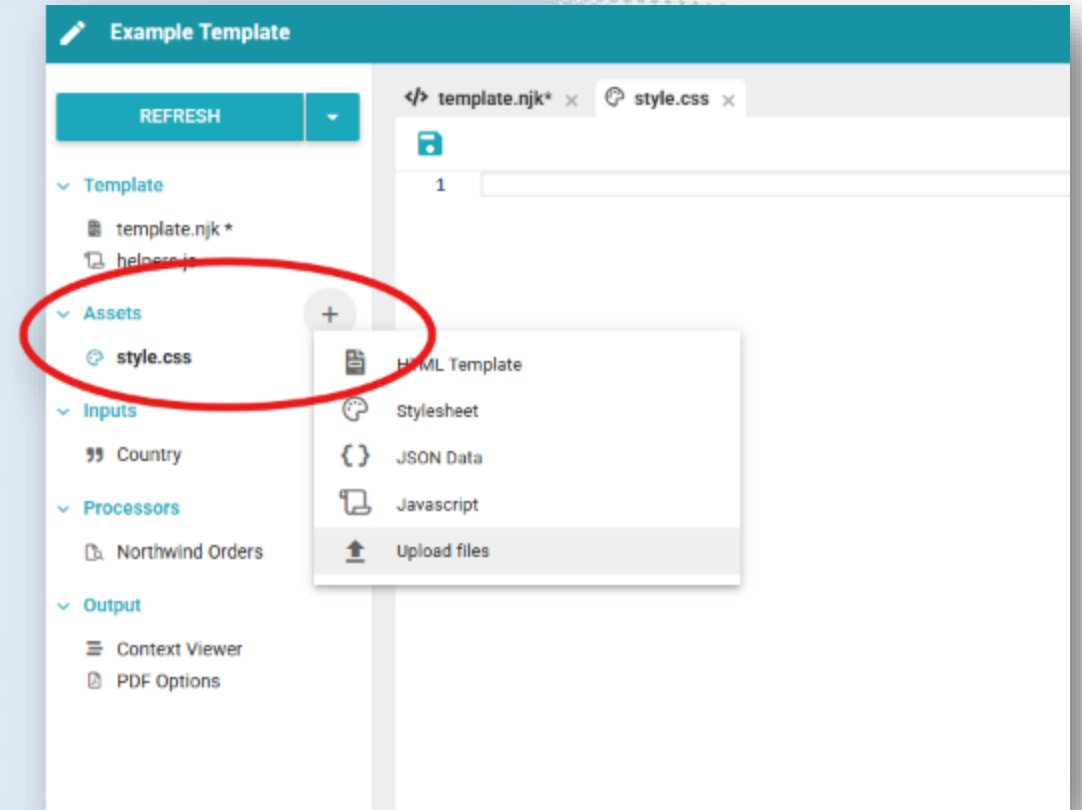
- Nunjucks templating engine used to fill in variables



Template Report: Assets

Assets are files that are loaded into the Template for visual purposes

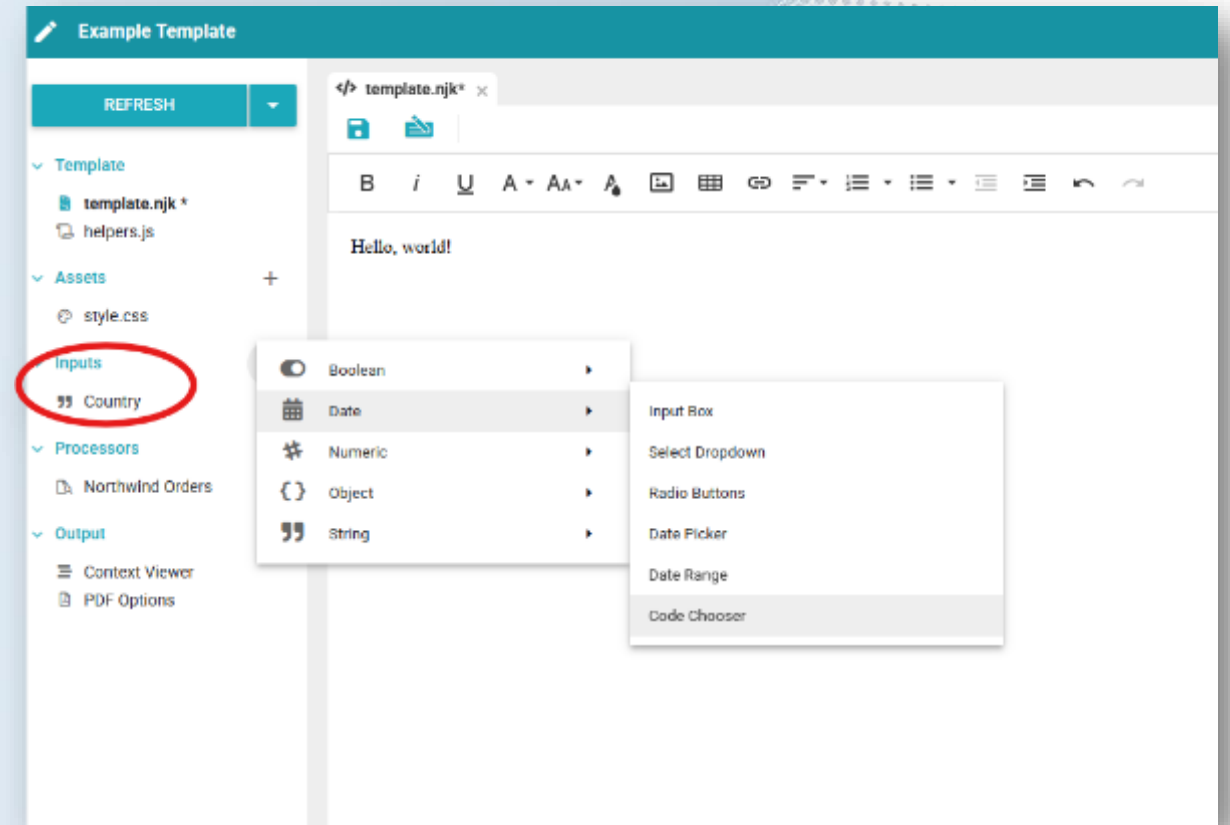
- Stylesheets
- Logos
- Custom headers
- Custom footers



Template Report: Inputs

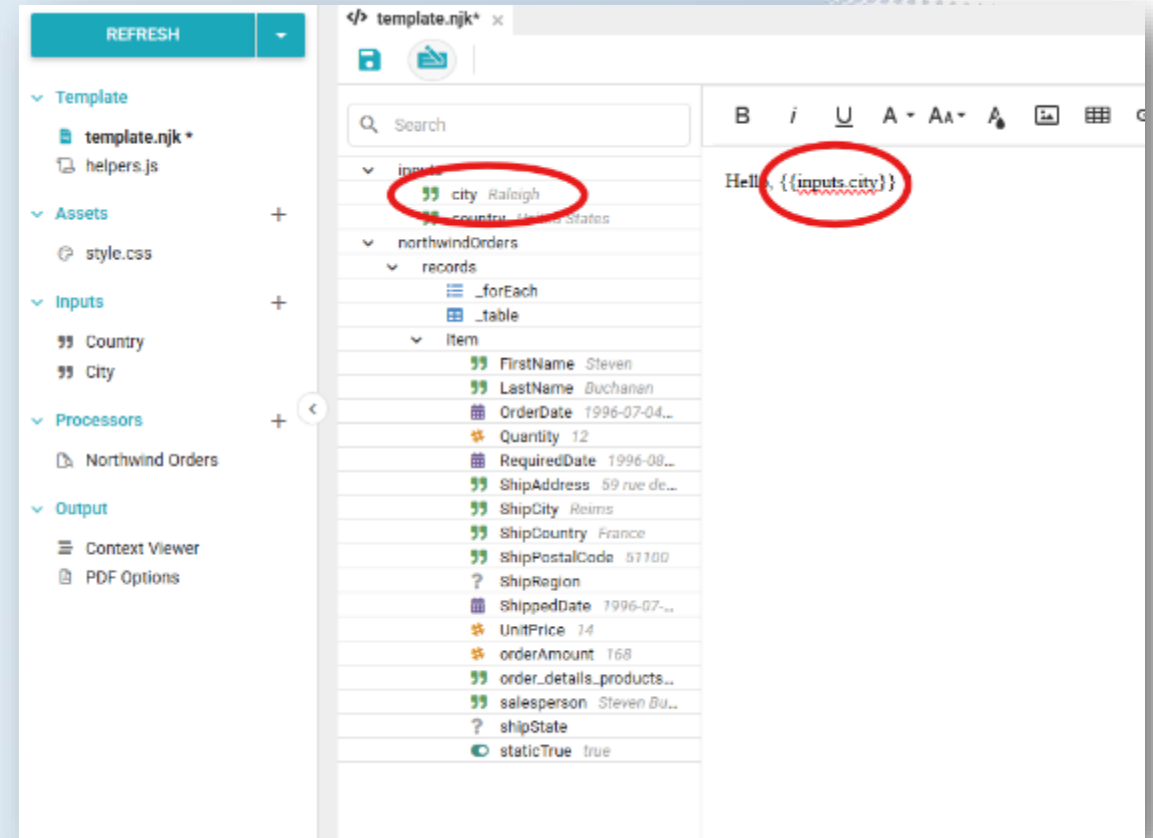
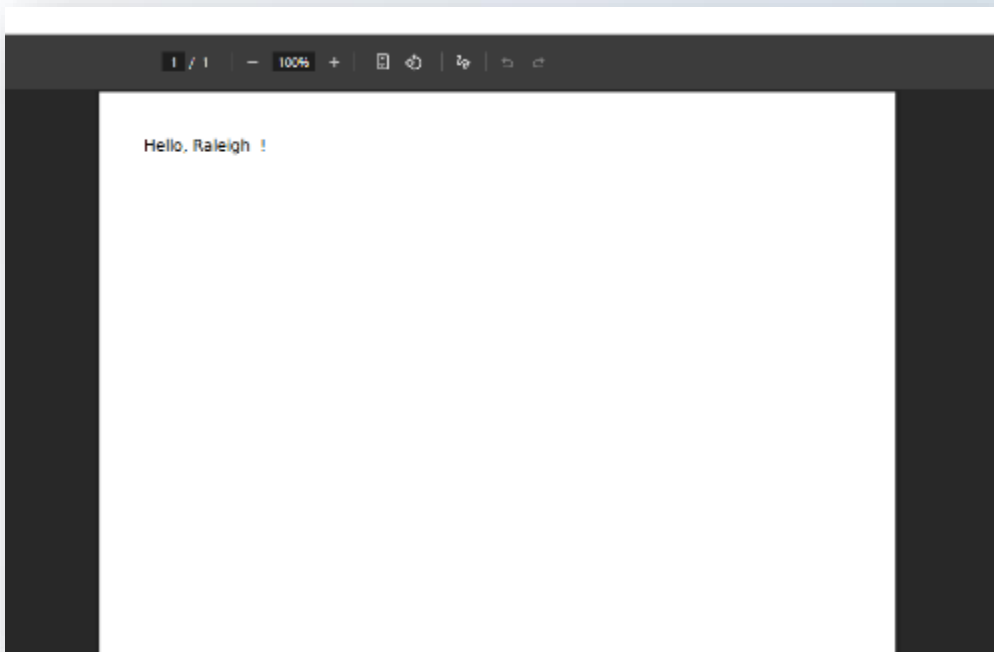
Inputs allow runtime values to change the output

- 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

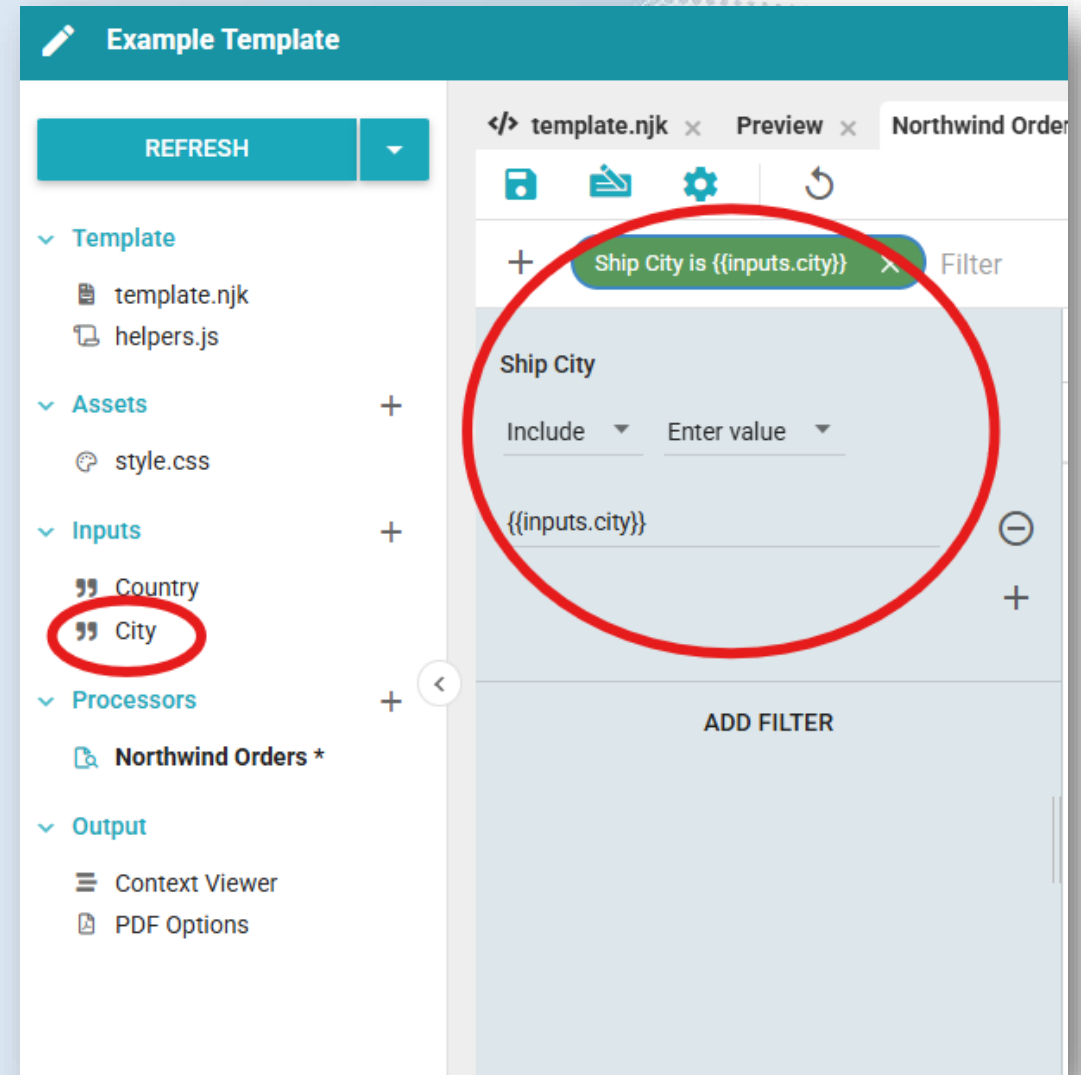
- Datasets
- Ad hoc Queries
- Power Script
- Current User

The screenshot shows a web application interface for a template report. On the left, a sidebar contains a tree view with categories: Template (template.njk, helpers.js), Assets (style.css), Inputs (Country, City), Processors (Northwind Orders*), and Output (Context Viewer, PDF Options). The 'Processors' section is highlighted with a red circle, and a dropdown menu is open, listing options: AI Assistant Prompt, Ad hoc Query, Current User, Dataset, Native Elasticsearch Query, Native SQL Query, and Power Script. The main area displays a table titled 'Northwind Orders*' with columns: Ship Address, Ship City, Ship Region, and Ship Postal Code. The table contains 18 rows of data, including addresses like '59 rue de l'Abbaye', 'Luisenstr. 48', and 'Rua do Paço, 67'.

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

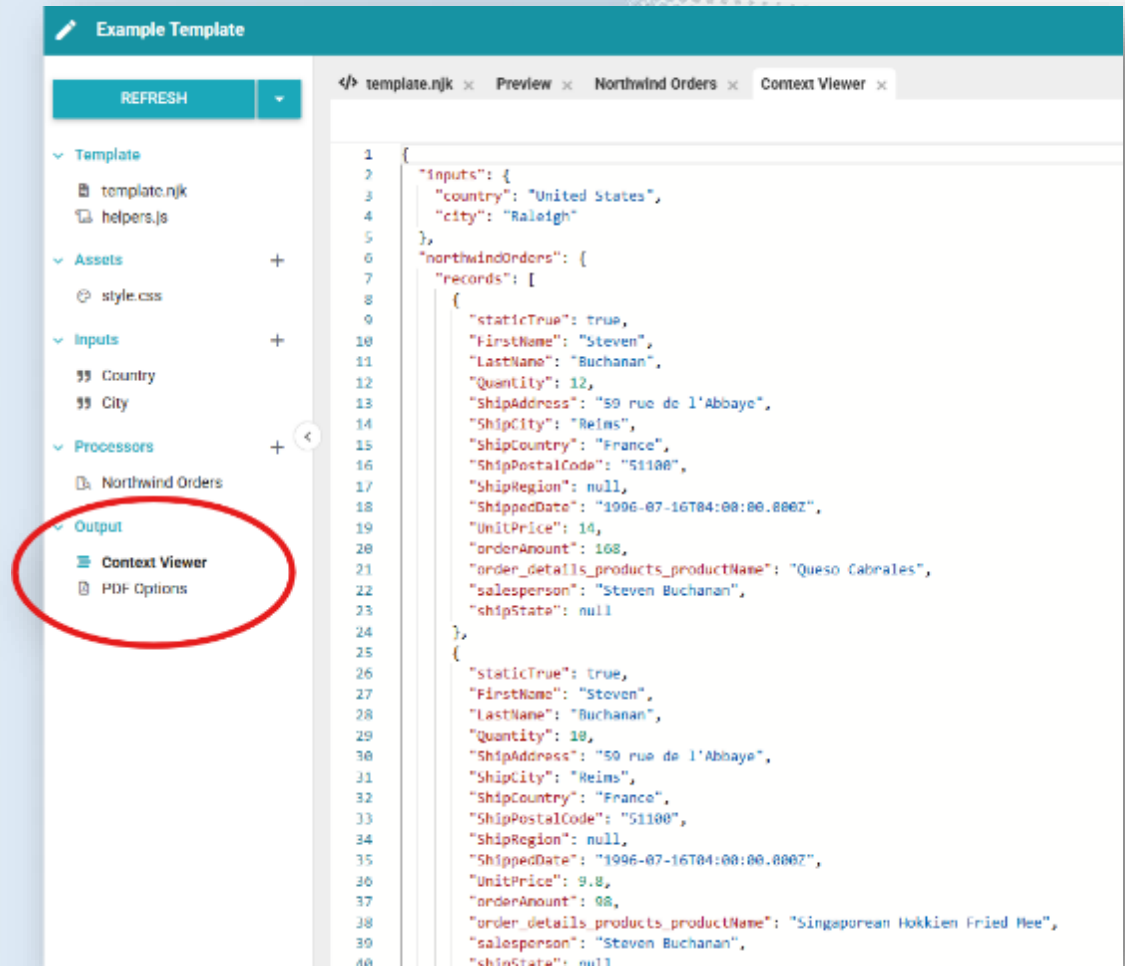
Template Report: Processors

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



Template Report: Output

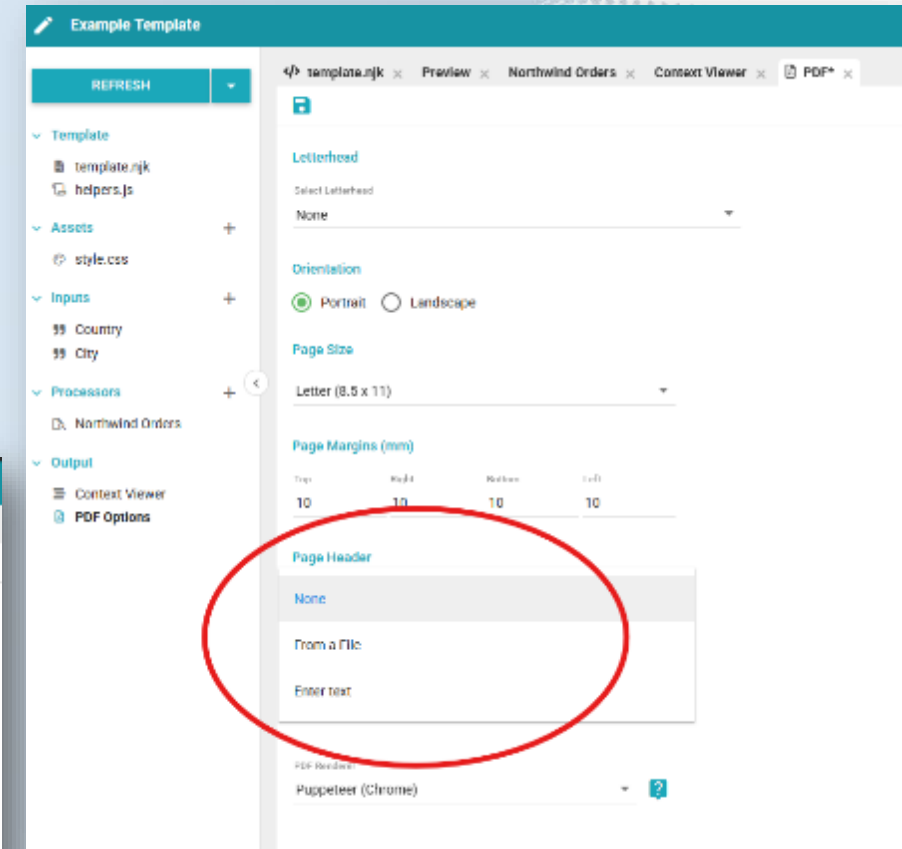
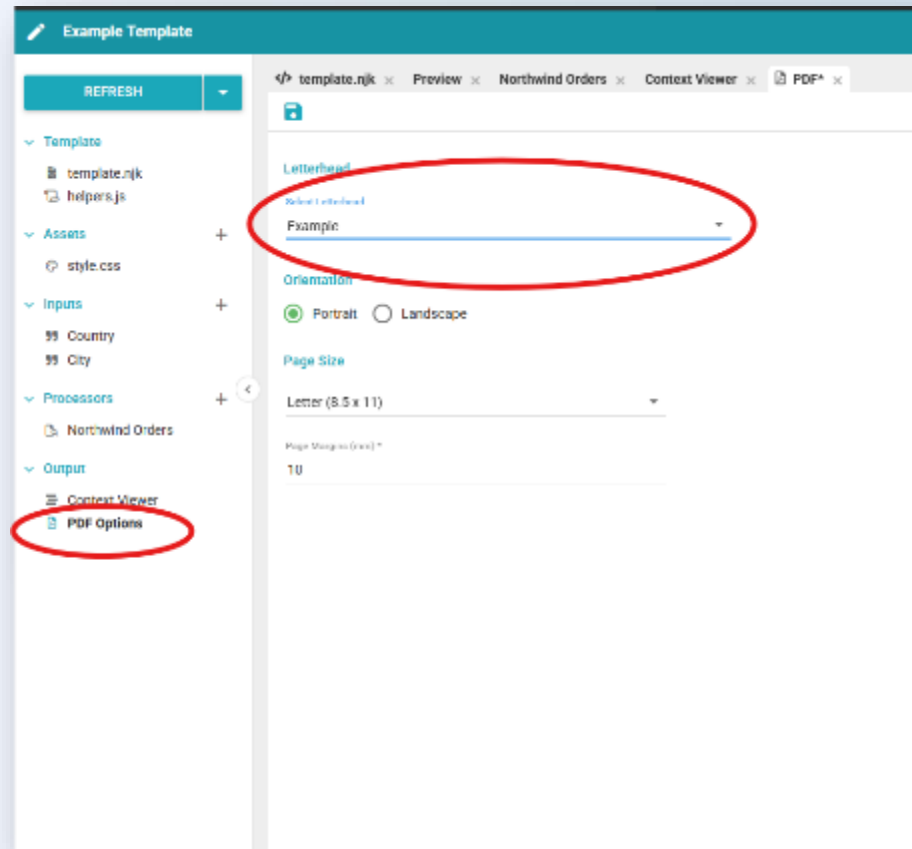
- Context Viewer is the result of all the Inputs and Processors
- The result is sent into Nunjucks template
- Any variables here can be referenced in the Template

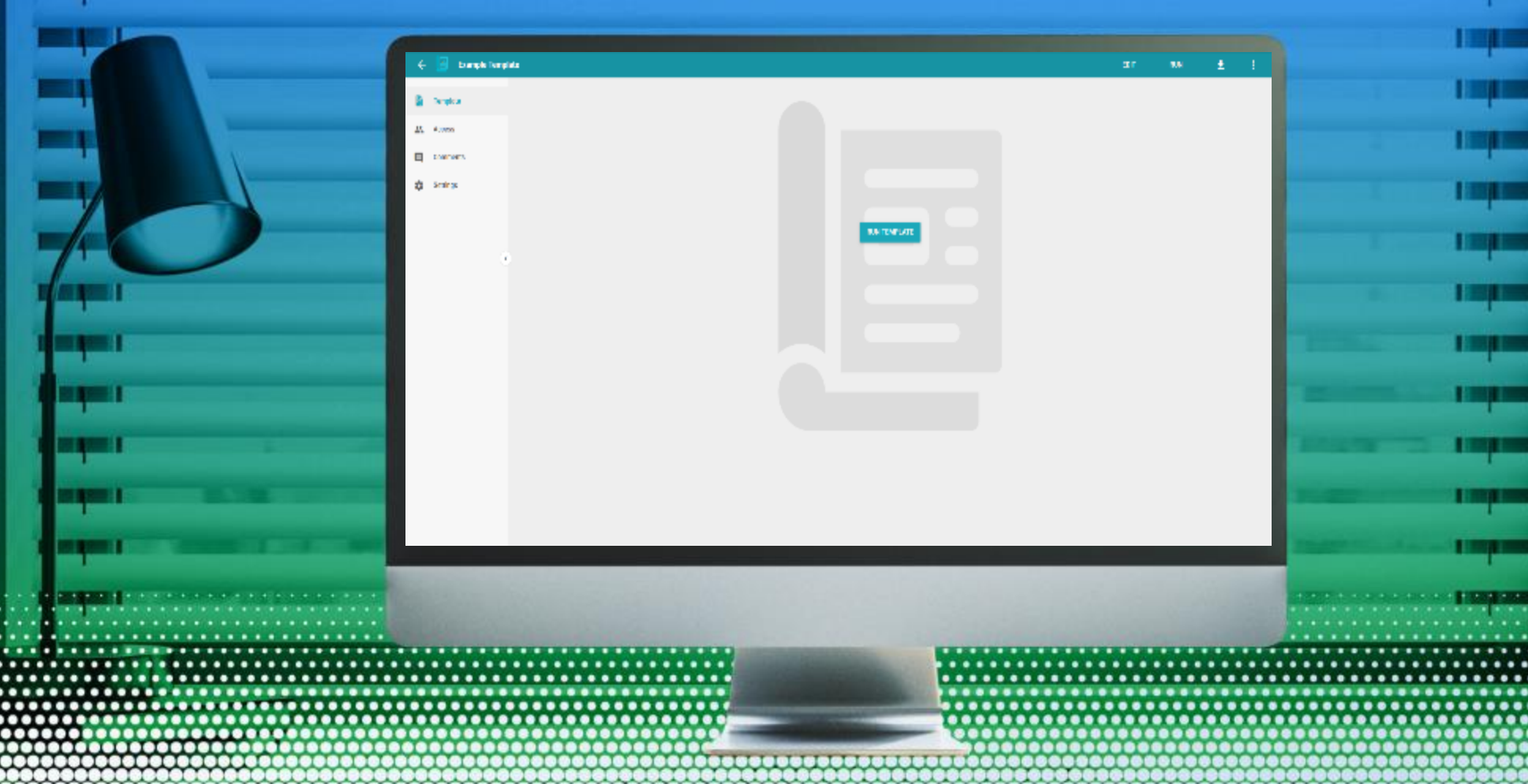


Template Report: Output

PDF allows customization of the output

- Choose a Letterhead
- Or choose Assets to be headers and footers





Templates Demo



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