



# Create and Use a Report Template

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Training Manager, Digimind

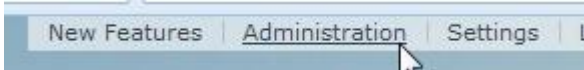
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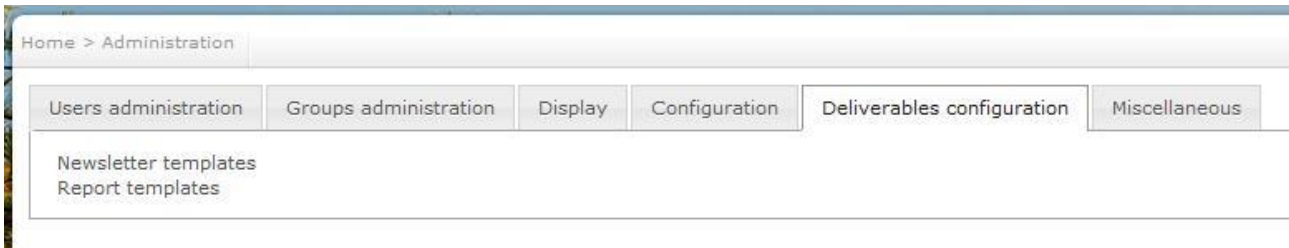
# 1. Download the template

## find the template as an administrator

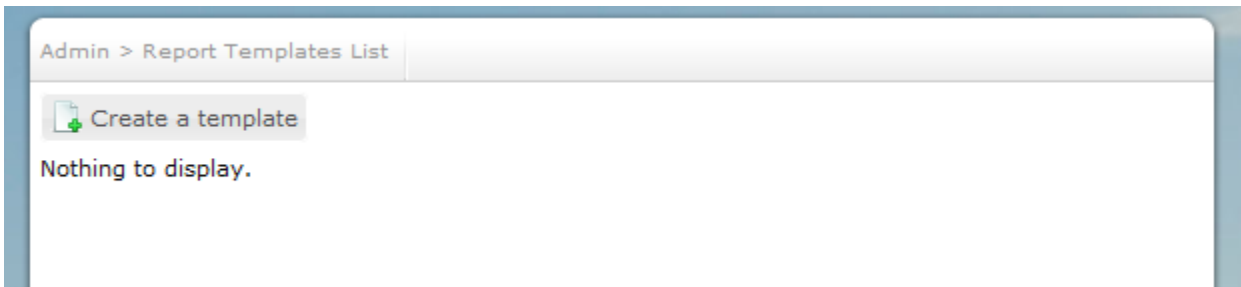
Click on the admin tab:



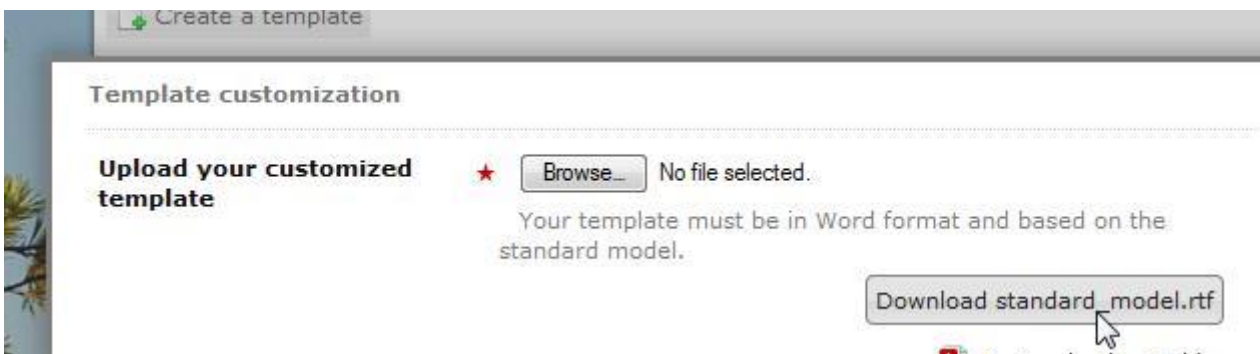
Then select the deliverables configuration tab and inside this, click on "Report templates".



Then click on "create a template":



Download the standard\_model.rft.





## find the template as you create a report

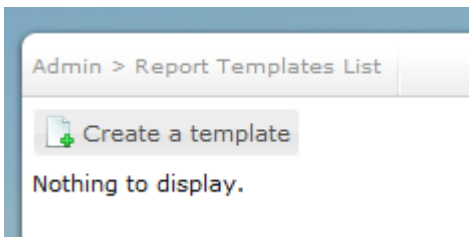
As you are creating a report, you will be able to manage the templates.

### Create report

You can personalise your report by enter report title, file type ...

Report title	<input type="text" value="Digimind Intelligence Report"/>
File type	<input type="text" value="DOC"/>
Report template	<input type="text" value="Standard"/> <a href="#">Manage templates</a>

When you click on manage templates, you will then be able to access and download the standard\_model.rtf file.

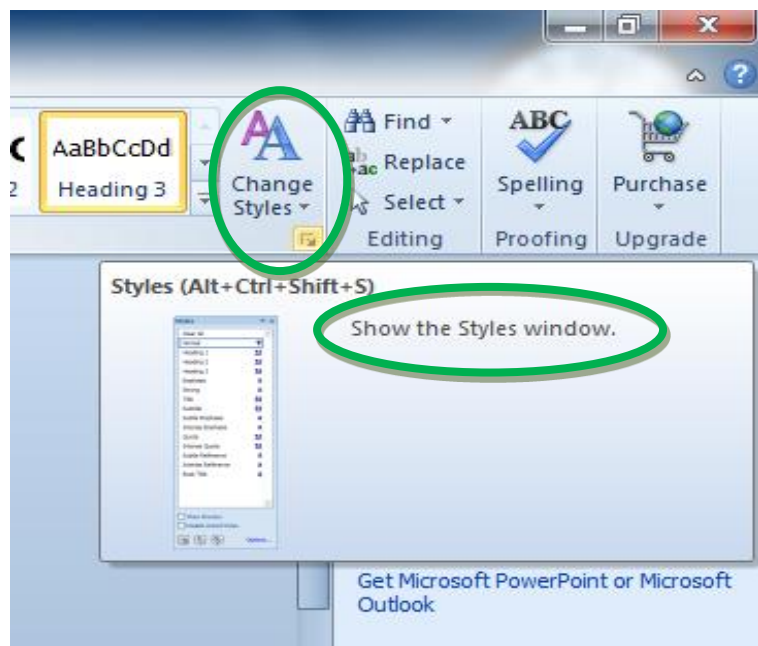


## 2. Rework the document

### change the styles of the text

Inside the rtf file, you can change the typeface, colours and size of all the fonts in the document.

To do this, at the top of the document click on the arrow below “Change styles” and then select to show the styles window.



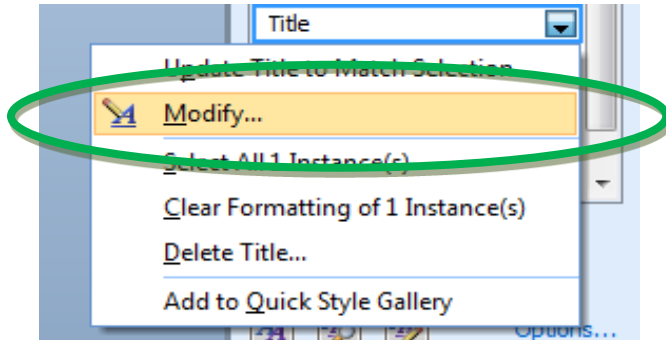


When you click on part of the document, for example the title, you will see the corresponding style appear with a blue rectangle in the styles menu:

<<PG\_TITRE>> ¶

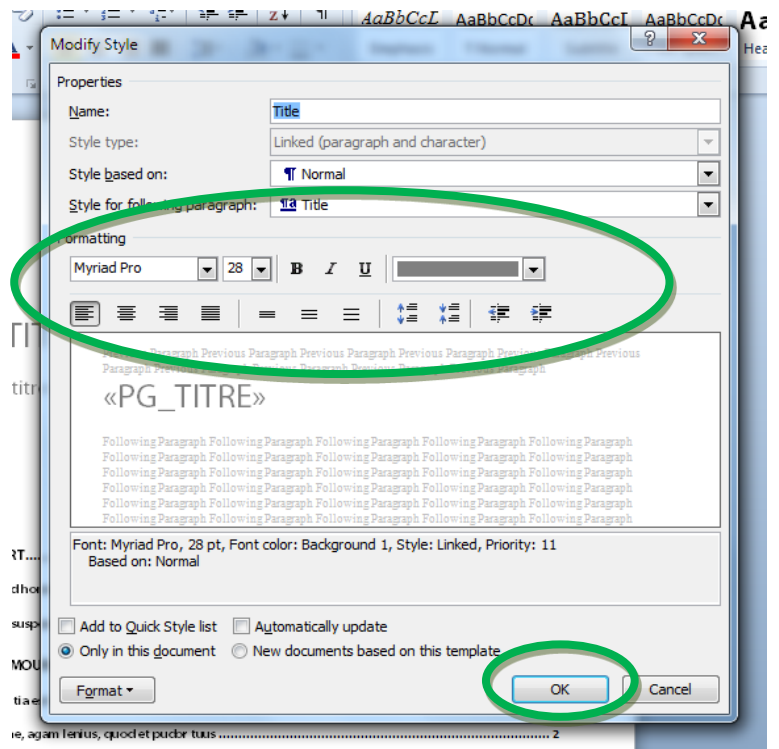


You can then open the drop-down menu by the side of that style, and from here, you can modify the style:



This will open a new page

Use the format bar to make the changes you would like to the font, size, colour, position, etc.



Then click on OK.

The style has now been updated in the template.

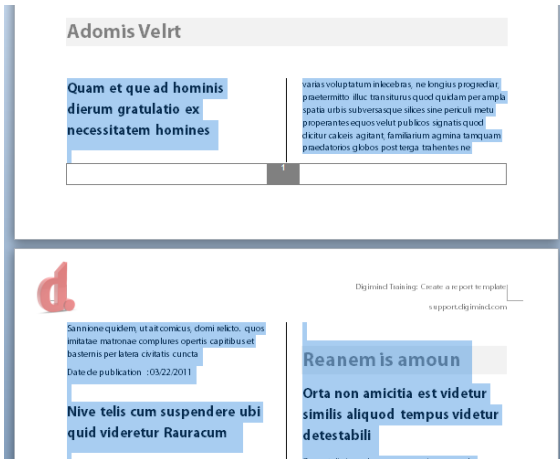
Continue to work through the other styles in the same manner.



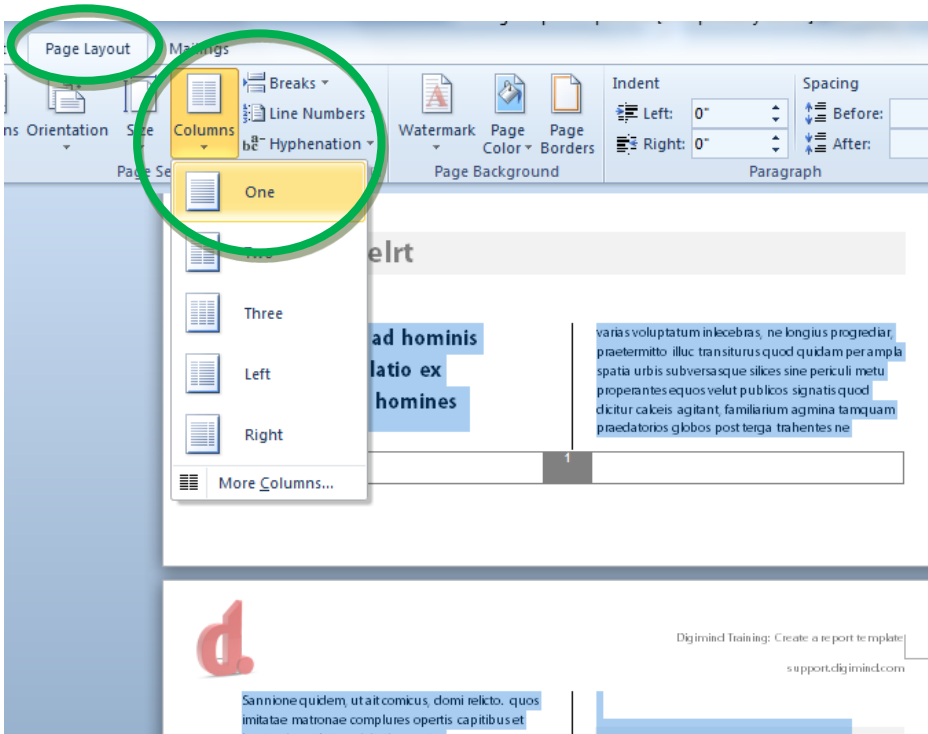
## special case - columns

The Digimind template has been prepared with 2 columns. It is possible to remove the columns from the template so that your report will not have columns.

To do so, first select the part of the rtf file that appears with columns:



Then, on the Word tabs, select page layout. From here you can select the number of columns you would like for your reports.



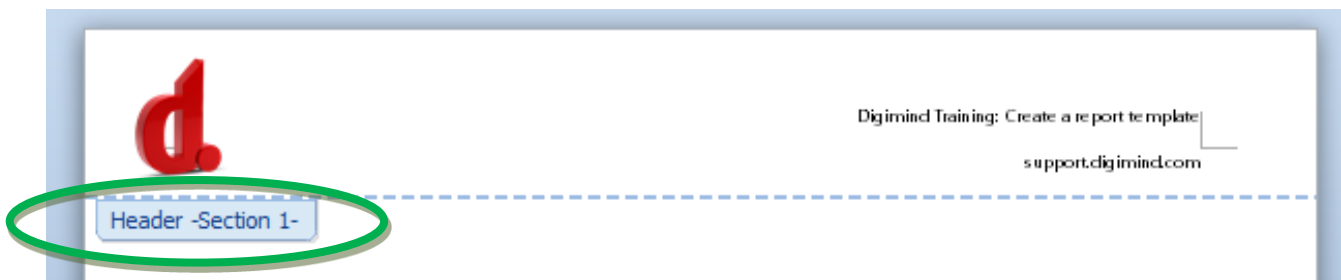


## special case - header and footer

To personalize the header and footer, double click inside the header or footer zone:



It is now possible to change the contents of the text and also the style of the text.

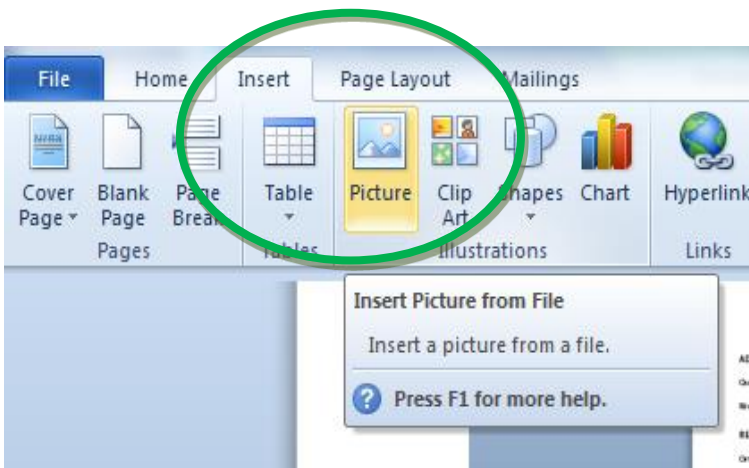


To close the header or footer editor, double click on the blue rectangle.

## special case - insert images

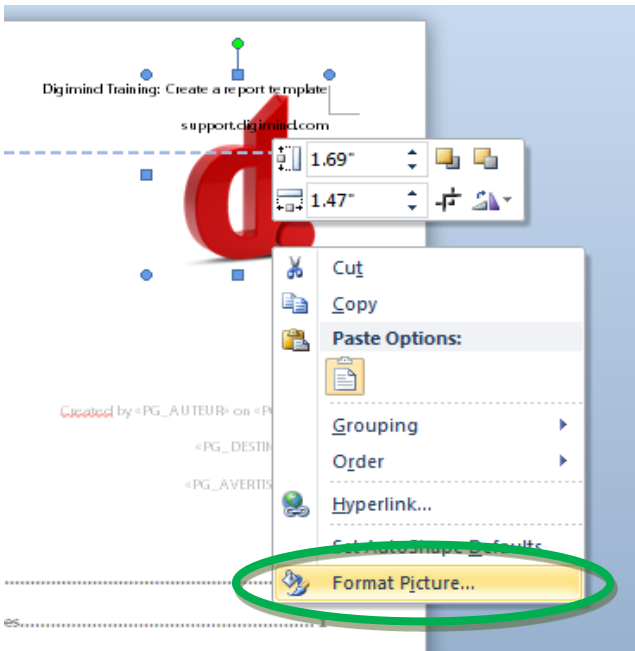
Images can be inserted in the header or footer zone.

To do this, use the insert button at the top of Word to select an image:

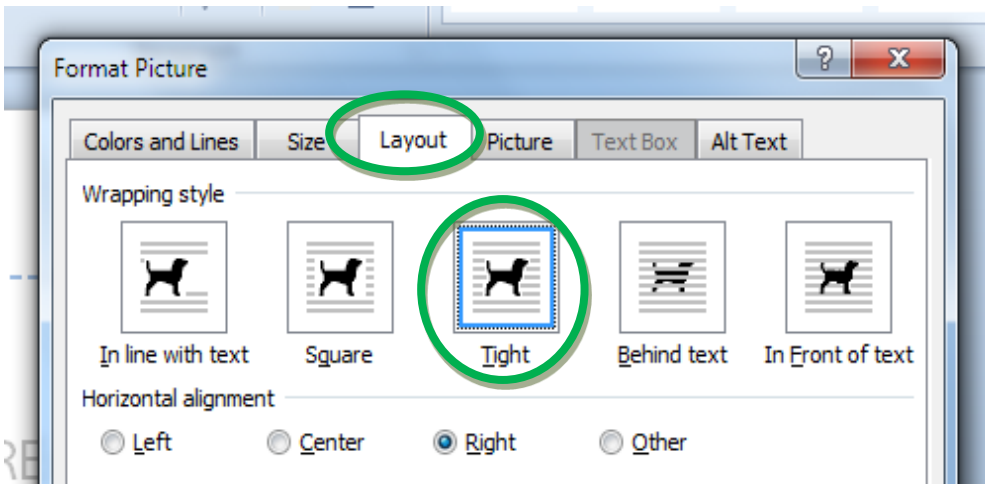




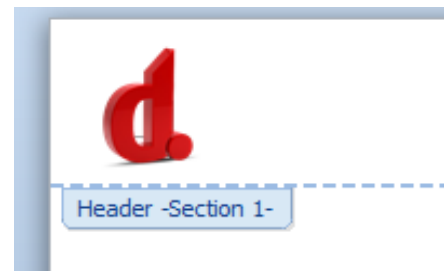
The image will then appear in the header zone. Right click on it to open the format options:



On the next page, use the layout tab to select a tight layout. This layout will allow you to position the image more precisely.



You will then be able to resize your image and change its position in the header or footer zone.



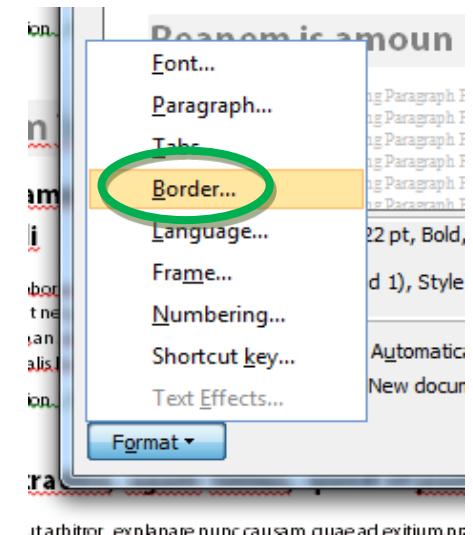
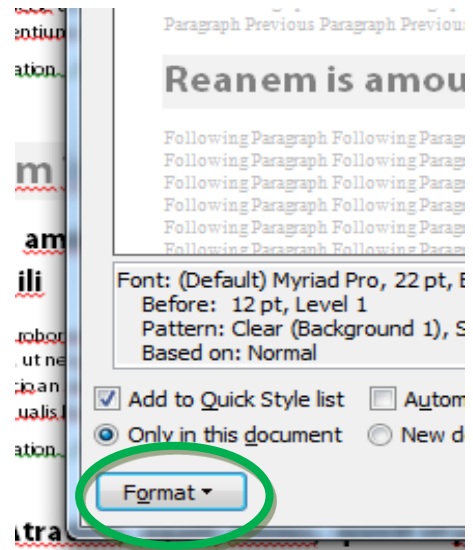


## special case - text with a background

The folder names in the Digimind template have a coloured background. To add or remove backgrounds from parts of the text, first open the style menu and click to modify the style in question.

At the bottom of the window, click on the format button.

Then select border.

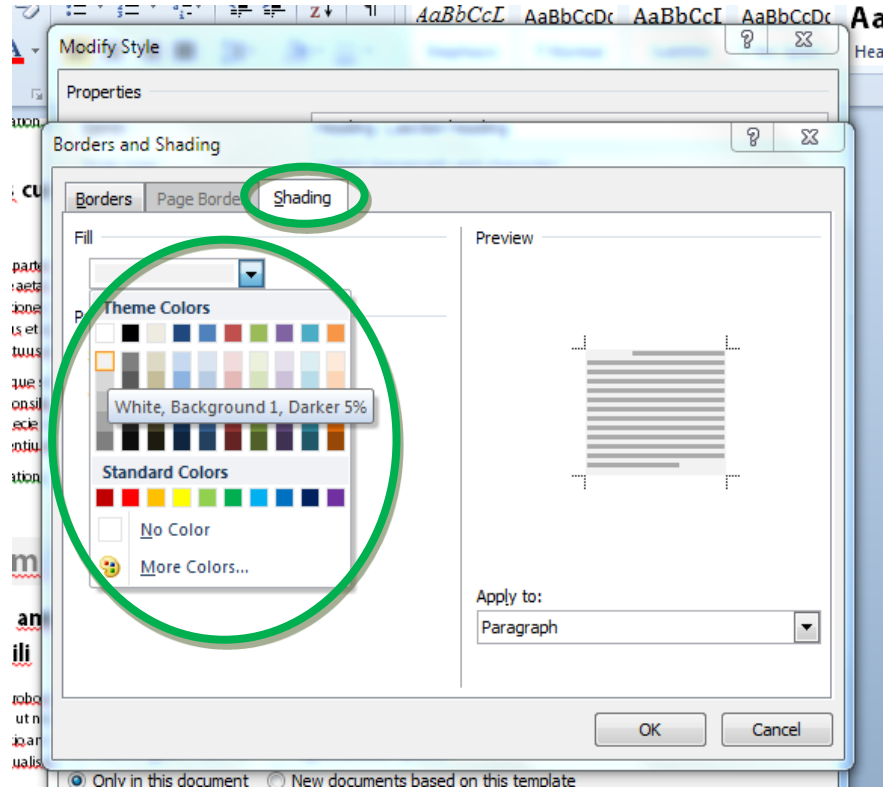






Then, you will be able to select the shading tab.

From here you will be able to select the colour you would like.



### 3. Save the document

#### save the template

Save the document as an rtf file.

If the file is saved in another format, Digimind will not be able to recognise it.



## 4. Upload to Digimind

### upload as an administrator

Inside the administration tab, click on deliverables configuration and then on report templates, and on create a template.

You will then be able to select your rtf file and name the template.

**Template customization**

**Upload your customized template** \*  training template reports.rtf

Your template must be in Word format and based on the standard model.

[Customization Guide](#)

**Template's name** \*

training template

Obligatory fields are indicated with \*

### upload as you create a report

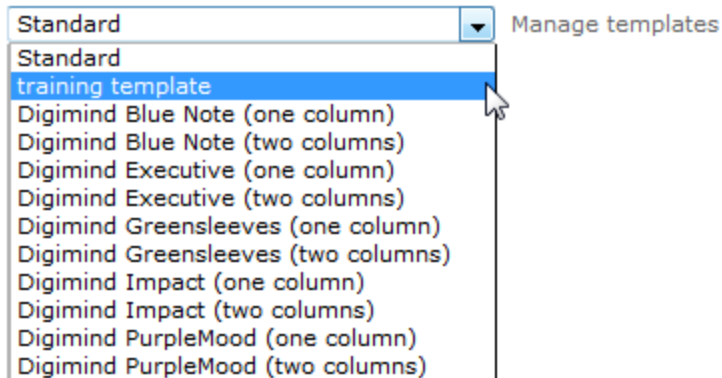
Inside manage templates, click on create a template, and then you will be able to select your rtf file and name the report template.



## 5. Select and use your template

### use your template for your reports

You will now be able to see your template in the drop-down menu manage templates as you are creating a report.



The document you are reading was created using the training template selected from the list above.