

Converting Report Templates from 4DM v2015 and Earlier

OVERVIEW

4DM v2016 introduced a new Reporting Engine. Users who modified report templates in 4DM versions 2015 and earlier, and wish to use them in v2016 and later, must convert them for use.

Templates are seamlessly converted using the following steps below.

HOW TO GUIDE

To convert report templates from v2015 and earlier, launch 4DM Administration and select the templates to be converted. Follow the steps below.

1. Double-click on the **4DM Administration** icon to launch the application. If a desktop icon does not exist, browse to the application to open:
 - a. Windows users (Figure 1)
 - i. Click the **Windows Start** button on the **Windows** screen toolbar or keyboard and type **4DM Administration** in the Search Box
 - ii. Select **4DM Administration** from the Search Box results to open
2. Enter your **Username** and **Password** (Figure 2).
3. Within 4DM Administration, click the **Report Templates** screen (see 1 Figure 3) from in the Reporting section.
4. Select the **Open** tool (see 2 Figure 3) to display available report templates.
5. In the Template Selector window (Figure 4), click **Add** (see 1 Figure 4) to open Windows Explorer.
6. Windows Explorer (Figure 5) displays the custom report templates used in the previous version of 4DM.
 - By default, the directory displayed within Windows Explorer is the report template directory used in the previous versions of 4DM: **C:\Users\Public\Documents\INVIA\Corridor4DM\reportTemplates**
 - Users who have custom report templates in a different directory must browse to that location in Windows Explorer
7. Select the report template(s) to be converted (see 1 Figure 5). Multiple report templates can be converted simultaneously by holding down the **Ctrl** key and left-clicking on each template.

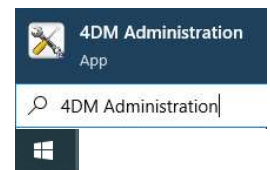


Figure 1. Open 4DM Administration

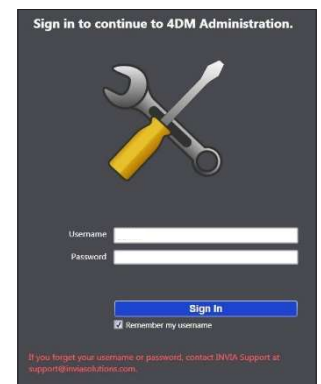


Figure 2.

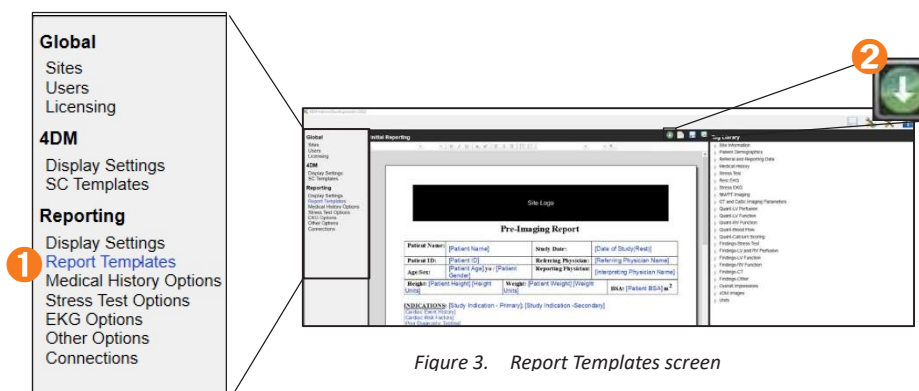


Figure 3. Report Templates screen

8. Click **Open** within Windows Explorer to convert the template (see 2 Figure 5). The converted template is added and saved to the Report Templates list within the Template Selector window (Figure 6).
9. Select the converted report template from the Report Template list, and click **Open** (see 1 Figure 6) to review for any unsupported report tags or errors.
10. Report tags from v2015 and earlier that are not supported by the new **Reporting Engine** will be highlighted in red. To delete any unsupported tags, simply highlight the unsupported tag and select the backspace key on the keyboard.
11. To add the new version of the unsupported tag, Left-click and drag the report tag from the **Tag Library** (Figure 7) to the desired location in the report template. Repeat steps 10 and 11 for each unsupported report tag.

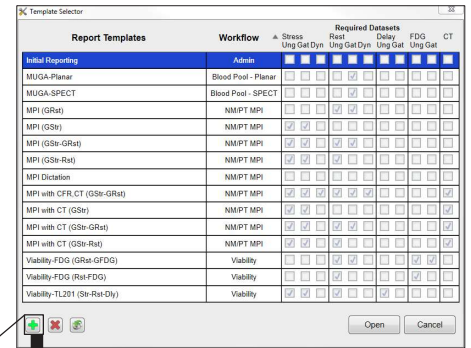


Figure 4. Template Selector window

Saving a Report Template:

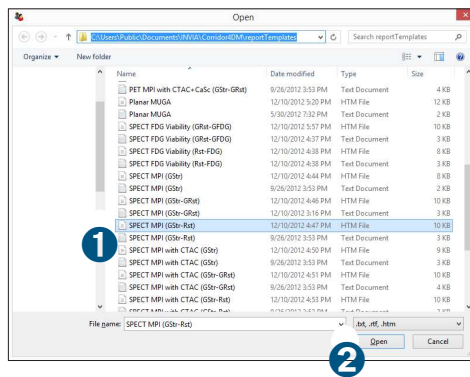


Figure 5. Custom Report Templates displayed in Windows Explorer

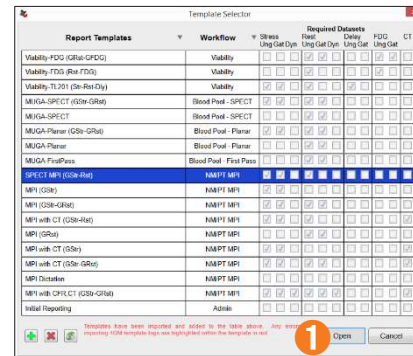


Figure 6. Template Selector window displaying added template

Two options are available for saving a report template.

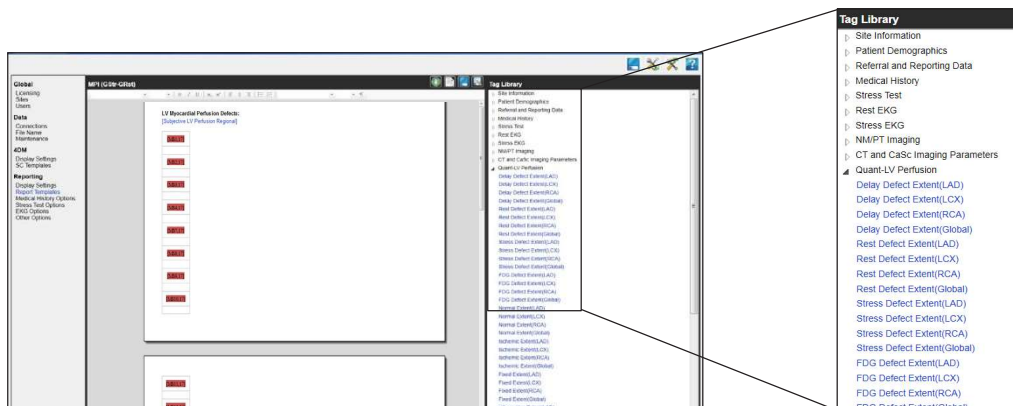


Figure 7. If errors are found, replace the errors with tags from the Tag Library

1. Click **Save Template** (see 1 Figure 8) to save the report template with the converted File Name and assigned Workflow.
2. Click **Save Template As** (see 2 Figure 9) to change the **File Name** or **Workflow** that the template is assigned to, or to apply this template to a designated site.

- a. **File Name:** Type the desired file name for the template
- b. **Workflow:** Use the dropdown selector to associate this template with a specific workflow
- c. **Site Applied To:** Use the check toggle boxes to associate this report template with a customer site.

- 1 Click **Save as** (see 4 Figure 9) to save the updates to the report template.
 - 2 • Sites are defined within 4DM Administration on the Sites page. See Chapter 2 of the 4DM User's Guide for more information.

- 3 It is recommended that users back-up 4DM preferences after converting and making updates to report templates (see 1 Figure 10). To back-up 4DM preferences, refer to the Backing-Up Preferences Help Sheet.
- 4 Click **Close** (see Figure 11) to exit 4DM Administration.

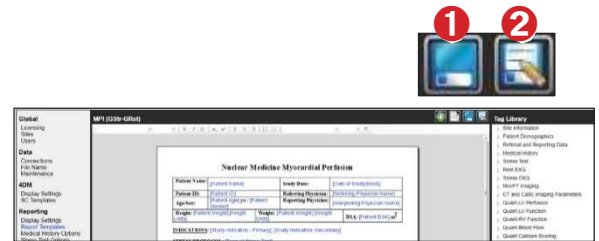


Figure 8. Save Template options

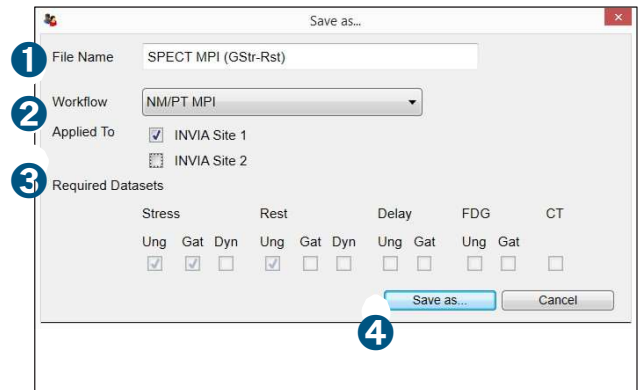


Figure 9. Save as... window



Figure 10. Backup 4DM Preferences

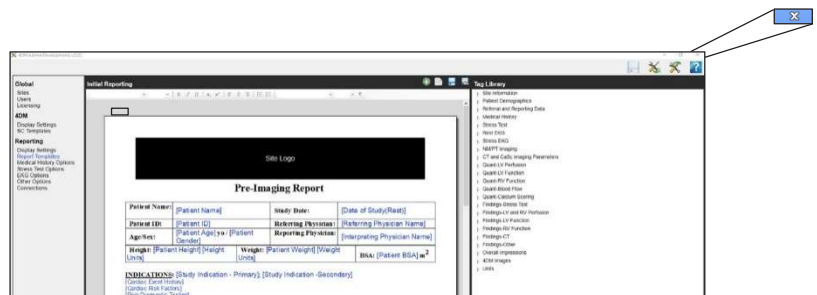


Figure 11. Close 4DM Administration