ONSIGHT FLOW GUIDE

Creating Your First Report Template

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CREATING YOUR FIRST REPORT TEMPLATE

When a job has been completed, Onsight Flow can generate reports that can be emailed out. What a 'report' contains is entirely up to you. A report might be a detailed job report showing all the completed steps in the job (much like our default report template), it could cover a specific part of a workflow (such as a health & safety check), or it could even just be an automatically generated certificate.

Customized report templates are built using the Onsight Flow report editor. It uses a mixture of HTML and CSS to build the template, and also takes advantage of Handlebars to pull in data conditionally. It is completely within your control.

GETTING STARTED

Start by navigating to the Report Designer by going to the Dashboard, then navigating to Settings, and clicking on the Reports button. When the Report Designer loads, you will see a screen that looks like this:
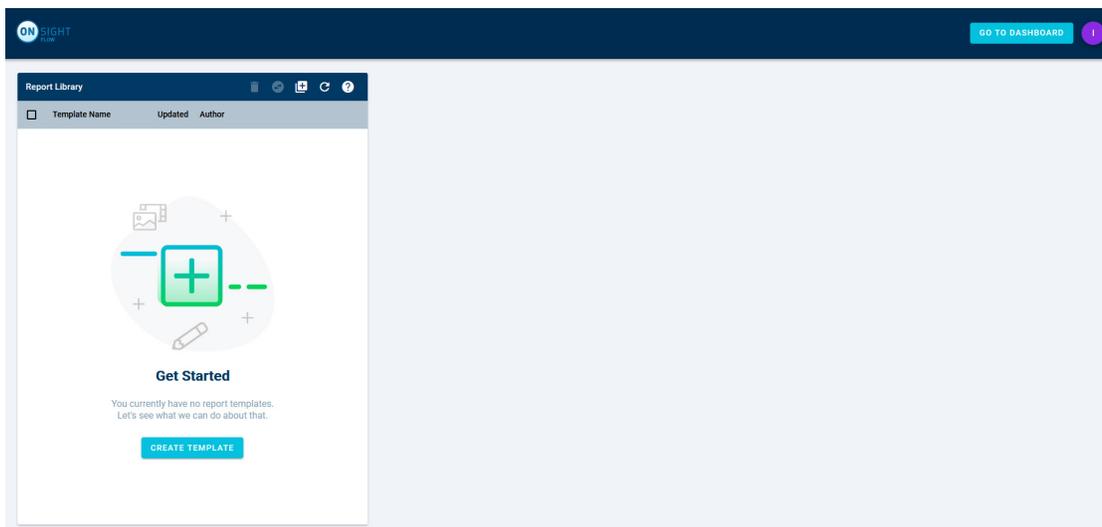
Start by clicking on the Create Template button . If you have already created report templates before, then you can click on the button in the toolbar to create a new template.

You will then be asked to enter a template name. This should not be the same as the name as any other report template in your Report Library.
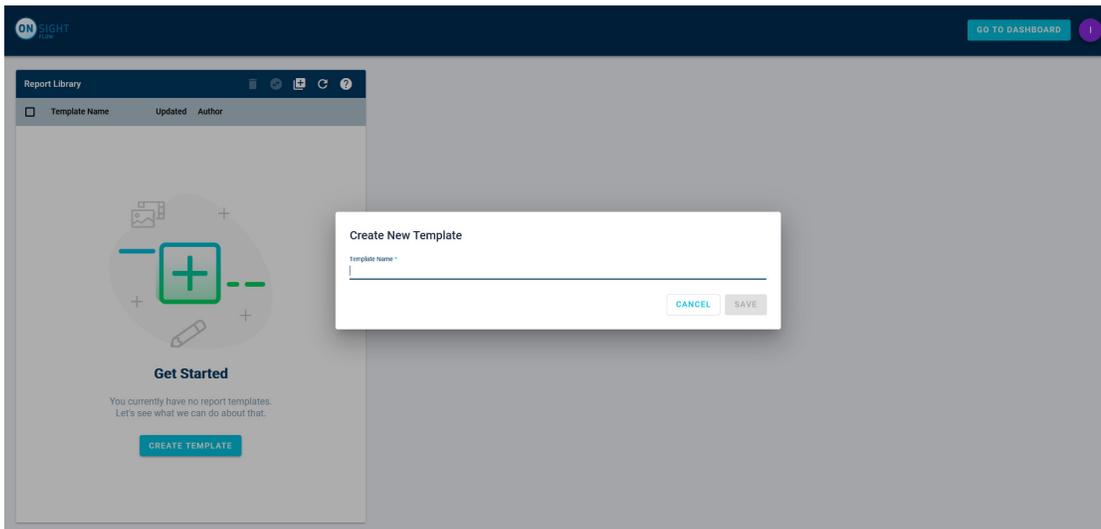
Once you have entered a template name, click on the Save button to continue. At this point, the Report Template Editor will open. The template will be filled in automatically with a boilerplate report (which is the Onsight Flow default report template) and will preview the report using the last completed job in your team. This template contains all the steps in the job.
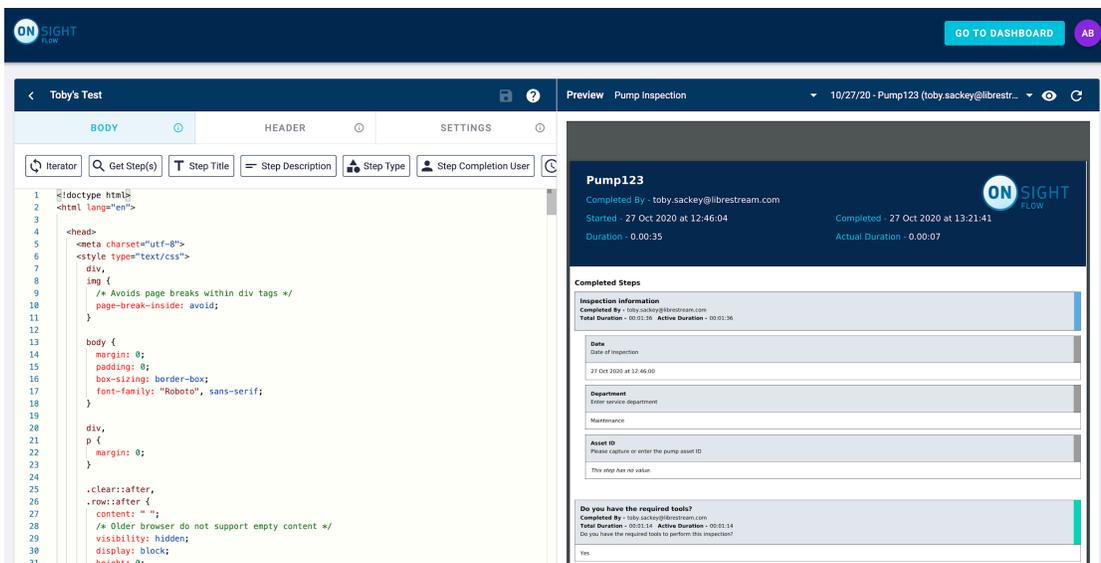
The Report Template Editor allows you to edit the body and header of your report template. You can also choose whether the report should be displayed in portrait or landscape, and set the report template as the team's default.

You will see references in the instructions below to the 'Body', 'Header' and 'Settings' tabs. These are the tabs at the top of the left-hand section. The Header sections cover the section at the top of each page of the report (shown in dark blue in the example above), and the Body section covers the rest of the content on each page of the report.

If you set the template as the team's default, when you download a job's report from the Dashboard or app, the team's default template will be used rather than the default Onsight Flow report template.

CHANGING YOUR LOGO

To change the logo of the report, go to the Header tab in the Report Template Editor as shown below.
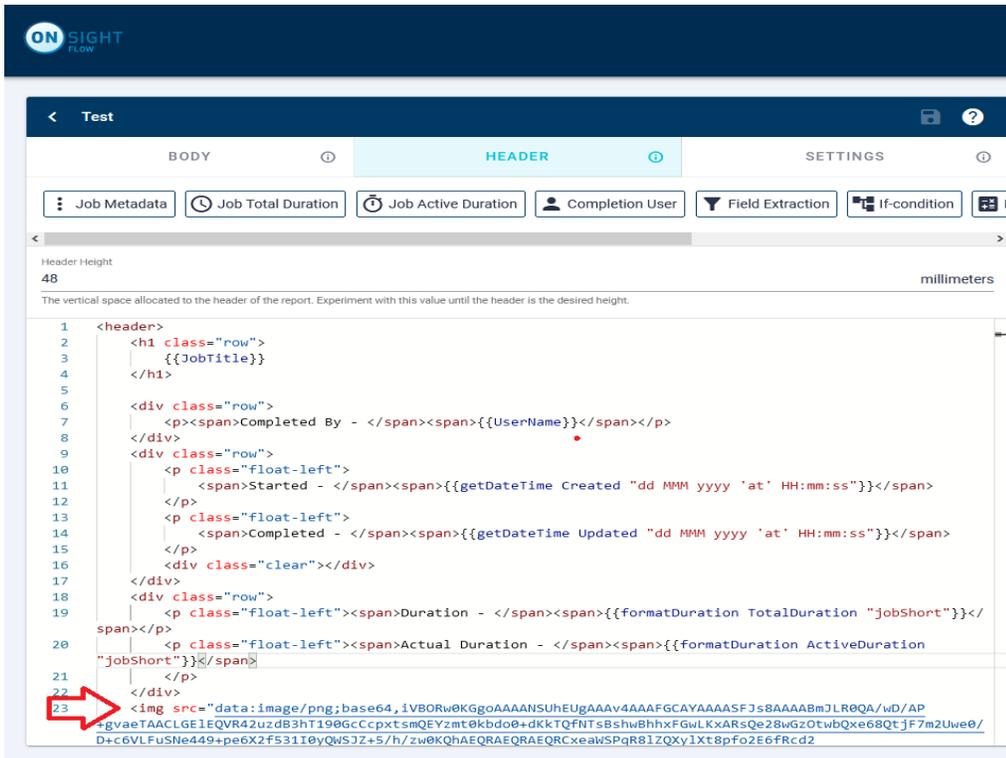
Scroll down and replace the entire html tag **img src** value which it begins with **data:image/png;base64** with your logo image source. Another screen shot is shown below of the **img src** tag.
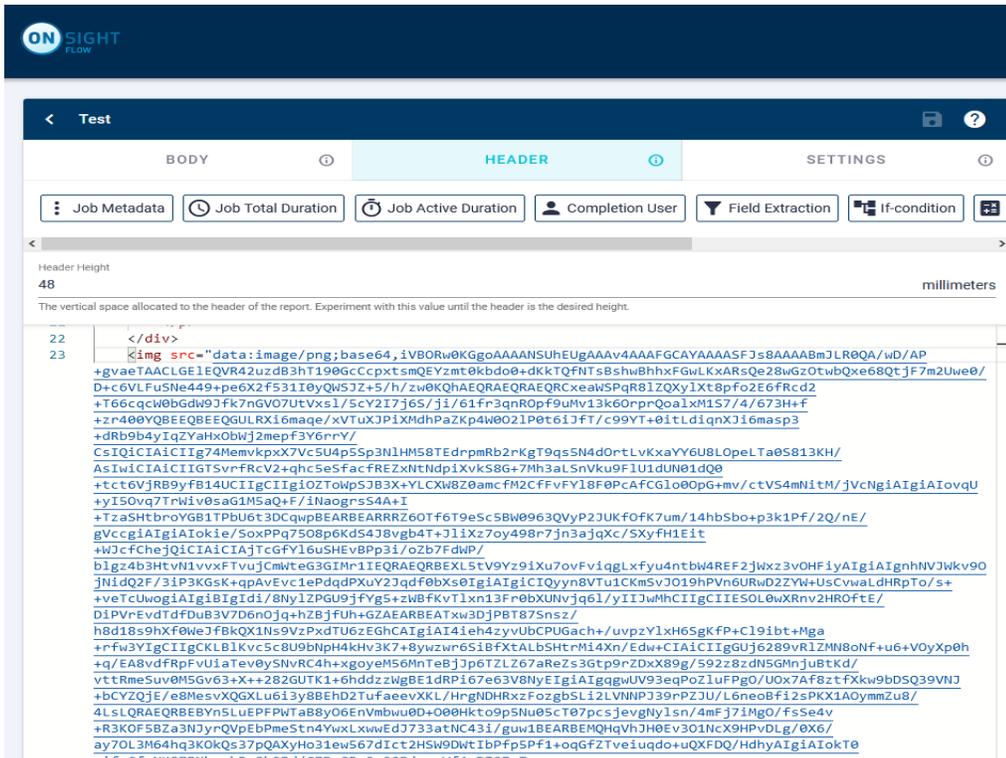
CHANGING THE PAGE ORIENTATION

To display the report in landscape mode, go to the Settings tab in the Report Template Editor, and select Landscape for the Report Orientation.
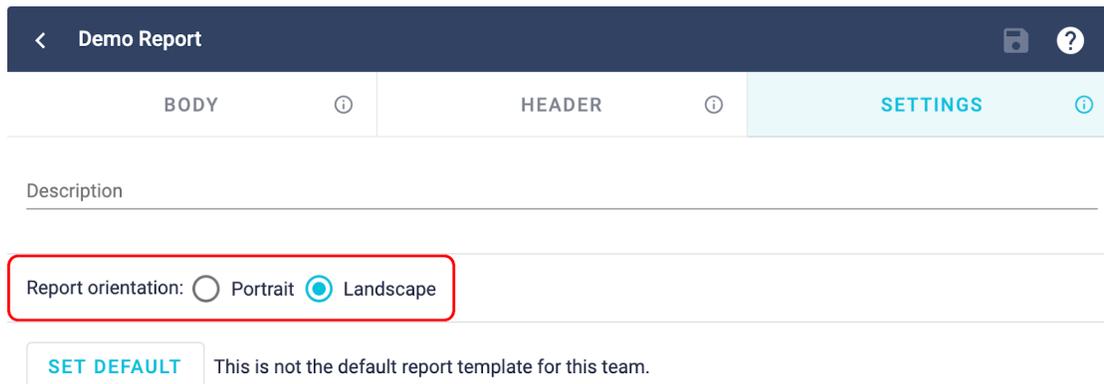
Once you have done this, the preview will regenerate and you should notice that the report will now be displayed in landscape.

CHANGING THE SIZE OF THE HEADER

To change the height of the header, go to the Header tab in the Report Template Editor. Underneath the Preset Bar, you will see an input for the header height in millimeters. This sets the amount of vertical space at the top of each page that is allocated for the header of the report. You can then change this value until the header is the desired height in your report, once completed, this will be reflected in the preview panel.
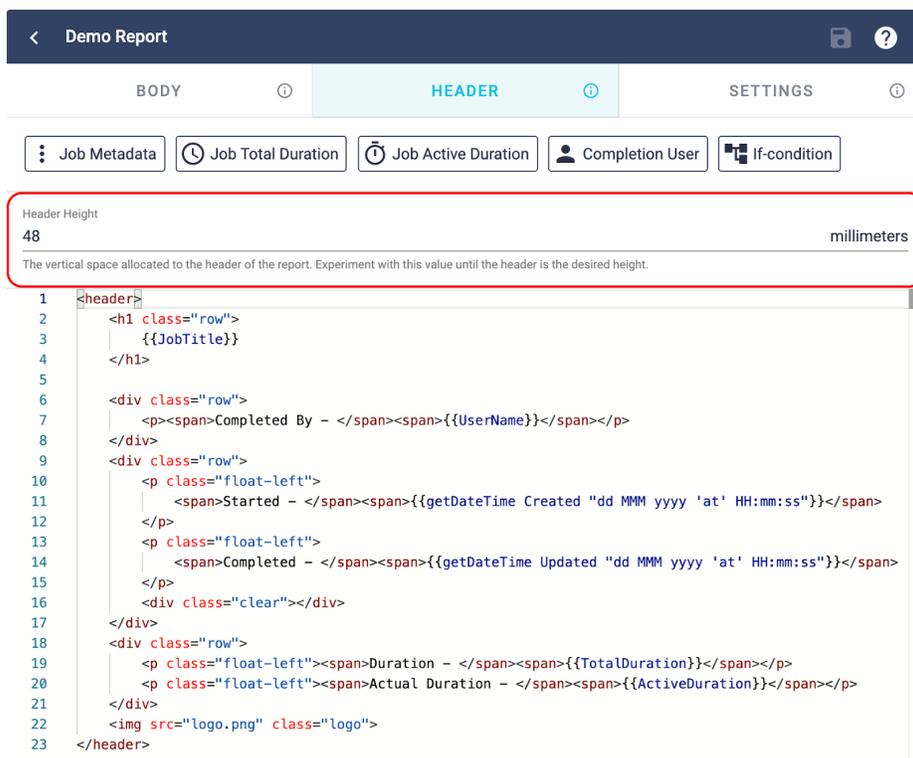
EDITING YOUR REPORT

The boilerplate template that you get when you create a new template already displays all of the steps in the job. Start by resetting the body and header to get a fresh template. Create a new report, and replace all of the text in the body's code editor with the following:

```
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">

    </style>
  </head>


  <body>

  </body>

</html>
```

You will notice that the preview will be generated and it will just be a blank page. You can now put some content in.

_____

SHOWING ALL STEPS

Start by going to the Body tab. To display all of the completed steps, place the cursor on line 12 (inside the <body> tags and click on the Iterator preset, and then click For-each Step. The body of your template should now look like this:

```
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">

    </style>
  </head>

  <body>
    <!-- All Steps -->
    {{#each Steps}}
      <div>
        {{#IsFormStep}}
          <div>
            <!-- Your code for form steps here -->
            {{#each Substeps}}
              <div>
                <!-- Your code for form substeps here -->
              </div>
            {{/each}}
            <!-- End of code for form steps -->
          </div>
    {{else}}
      <div>
        <!-- Your code for single steps here -->

        <!-- End of code for single steps -->
      </div>
        {{/IsFormStep}}
      </div>
    {{/each}}
  </body>

</html>
```

Once you do this, you should see a preview with all of the values for each step in the selected job. You will need to use HTML and CSS to style the report from this point.

CHANGING THE LOOK AND FEEL OF YOUR REPORT

If you only want to display completed steps in your report, rather than selecting the For-each Step iterator, you should select the For-each Completed Step iterator. Similarly, you can do the same for canceled steps.

CHANGING THE FONT

To change the font of the report, go to the Body tab, and then find the body selector on line 17:

```
*,
body {
    margin: 0;
    padding: 0;
    box-sizing: border-box;
    font-family: "Roboto", sans-serif;
}
```

CHANGING THE REPORT COLOURS

To change the header and background colour go to the body tab and navigate to line 36 of the template, you'll see background-color: #222d43;

You can then change the code from #222d43 to your branding colours, an example of hex codes are below, you can find more colours here.

```
35      header {
36          background-color: #222d43;
37          color: #fff;
38          padding: 1rem;
39          padding-bottom: 2rem;
40          position: relative;
41          margin-bottom: 1rem;
```

CHANGING THE FONT SIZES

To change the default font size of the template, go to the Body tab, and then find the body selector on line 17:

```
*,
body {
    margin: 0;
    padding: 0;
    box-sizing: border-box;
    font-family: "Roboto", sans-serif;
}
```

Add a new CSS property for font-size with the appropriate value to that block of code. For example:

```css
*,
body {
    margin: 0;
    padding: 0;
    box-sizing: border-box;
    font-family: "Roboto", sans-serif;
    font-size: 24px;
}
```

You may notice that the header height needs to be changed at this point. Please refer to the "How do I change the size of the header?" section. An ideal header height for the boilerplate template after making this change is 71.

Other font-size properties already exist in the template, so search in the CSS for instances of font-size and experiment with the values of those properties until you're happy with the result.

THUMBNAILS FOR ATTACHMENTS

Thumbnails for attachments can be displayed in the report by using the Step Attachments preset while inside the context of a step or substep (i.e. you are within a step iterator such as {{#each CompletedSteps}}) in the template. Please see the "show all steps?" section as a starting point for this.

BASE SIZE OF ATTACHMENTS

Once you have inserted the Step Attachments preset, you can modify the size of the attachment. Let's say that as part of your template, you have the following code:

```
{{#each Attachments}}
    <img src="{{getAttachmentUrl "default"}}" />
{{/each}}
```

There are currently 3 sizes of attachments:

• Small (maximum 200 pixels in the largest dimension)
• Medium (maximum 300 pixels in the largest dimension; this is the default size)
• Large (maximum 500 pixels in the largest dimension)

You can add an additional parameter to the getAttachmentUrl preset to set the size. The parameter can either be small, medium, or large. For example:

```
{{#each Attachments}}
    <img src="{{getAttachmentUrl "default" "large"}}" />
{{/each}}
```

Considerations should be made for the size of attachments; the larger the attachment size, the bigger the file size will be for the generated PDF report.

REFINING THE SIZE OF ATTACHMENTS

CSS can be used to refine the size of attachments. For example, if you want to make the maximum height of an attachment 100 pixels, you can do the following

```
{{#each Attachments}}
    <img style="max-height: 100px;" src="{{getAttachmentUrl "default"
{{/each}}
```

SHOW THE USERNAME OF THE USER WHO COMPLETED A STEP

To show the username of the user who completed a step, make sure that you are within the context of a step or substep, click on the Step Completion User preset to insert the following code:

```
{{UserName}}
```

For example, if you wanted to display the username next to the value of a step, you could have the following code:

```
{{Value}}
<p>This step was completed by: {{UserName}}</p>
```

SHOW SPECIFIC STEPS

If you only want to show specific steps (or you want to style different steps in different ways), you can use the If-condition preset. Within the context of a step or substep, click on the If-conditon preset, and select the If X equals Y preset. This will insert the following code:

```
{{#ifCond X "==" Y}}
<!-- Do something if the above condition is met - change X and Y to su
{{/ifCond}}
```

In this case, we want to only display certain steps. Let's say we want to only display a step if its Step ID is a certain value. We would need to change X to StepId, and Y to the ID of the step we want to display, and then we could add our step value underneath the if-condition. In the following example, the value of a step with the Step ID

```
{{#ifCond StepId "==" "b5385117-99c8-43dd-8ca8-447c09067218"}}
    {{Value}}
{{/ifCond}}
```

This isn't limited to Step IDs either. You could conditionally display the value of a step based on the Step Title. For example:

```
{{#ifCond StepTitle "==" "Part Number"}}
    {{Value}}
{{/ifCond}}
```

You can find all of the fields you can use in your if-condition by clicking on the View Job Data button in the Preview panel's toolbar.

ONLY SHOW STEPS THAT HAVE VALUES

If you only want to display steps that have a value, you can use if-condition preset for If step has a value. Within the context of a step or substep, click on the If-conditon preset, and select the If step has a value preset. This will insert the following code:

```
{{#ifStepHasValue}}
<!-- Do something if the step does have a value -->
{{/ifStepHasValue}}
```

Within that handler, you could insert the code used to display steps. For example:

```
{{#ifStepHasValue}}
<p>This step has a value of {{Value}}</p>
{{/ifStepHasValue}}
```

You can also use the If step does not have a value preset to highlight steps that should have values but the value hasn't been submitted by the user who completed the step.

SHOW THE STEPS WITH ANSWERS IN A TABLE

Start by creating a new report, and replace the body's code with the following:

```
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">

    </style>
  </head>

  <body>

  </body>

</html>
```

First, you will need to create a table outside the context of the steps, and then add a table header. For example:

```html
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">

    </style>
  </head>

  <body>
    <table>
      <tr>
        <th>Step Title</th>
        <th>Step Value</th>
      </tr>
    </table>
  </body>

</html>
```

Next, you will need to add an iterator for the steps in the job. For this example, only single steps will be displayed to simplify the code:

```html
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">

    </style>
  </head>

  <body>
    <table>
      <tr>
        <th>Step Title</th>
        <th>Step Value</th>
      </tr>

      {{#each CompletedSteps}}
      {{#unless IsFormStep}} <!-- This excludes form steps from appearing -->

      {{/unless}}
      {{/each}}
    </table>
  </body>

</html>
```

Finally, you will need to add a row and table cells for each step:

```
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">

    </style>
  </head>

  <body>
    <table>
      <tr>
        <th>Step Title</th>
        <th>Step Value</th>
      </tr>

      {{#each CompletedSteps}}
      {{#unless IsFormStep}} <!-- This excludes form steps from appearing -->
      <tr>
        <td>{{StepTitle}}</td>
        <td>{{Value}}</td>
      </tr>
      {{/unless}}
      {{/each}}
    </table>
  </body>

</html>
```

After doing this, and adding some CSS to style our table, you should have the following code for the body:

```
<!doctype html>
<html lang="en">

  <head>
    <meta charset="utf-8">
    <style type="text/css">
      table {
        width: 100%;
        border-collapse: collapse;
      }

      td, th {
        border: 1px solid #dddddd;
        text-align: left;
        padding: 8px;
      }

      tr:nth-child(even) {
        background-color: #dddddd;
      }
    </style>
  </head>

  <body>
    <table>
      <tr>
        <th>Step Title</th>
        <th>Step Value</th>
      </tr>

      {{#each CompletedSteps}}
      {{#unless IsFormStep}} <!-- This excludes form steps from appearing -->
      <tr>
        <td>{{StepTitle}}</td>
        <td>{{Value}}</td>
      </tr>
      {{/unless}}
      {{/each}}
    </table>
  </body>

</html>
```

This will display a preview of the selected job, where for every completed single step, there is a row containing the Step Title and Step Value of that step.