

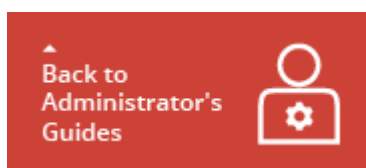
# Adding BIRT-4 Type Document Templates

## License Agreement

The article presents the features available in the Premium plan of XTRF Language Business Platform. Please keep in mind that your access to the described options might be limited due to your license agreement. If you would like to change your plan of XTRF Language Business Platform and gain access to the additional features, contact your [XTRF Customer Success Manager](#).

Target audience: Administrators, Project Managers

- Document Templates in XTRF Platform
  - I. Download the Document Template Files Package
  - II. Upload a Document Template
- Tips and Tricks



## Document Templates in XTRF Platform

In XTRF Platform you can find a set of Document Templates available by default. The default set of the Document Templates is prepared within the BIRT-2 version and give you an opportunity to generate documents for your partners, such as invoices or receivables, in the PDF format. In addition, you can get a series of Document Templates available not only in the PDF format, but also in the DOCX format. This package of files is prepared using the BIRT-4 version and can be downloaded from the XTRF repository. Within the Document Templates you can produce the final version of documents for your partners within a desired layout. Additionally, you can localize the Document Templates conveniently selecting an appropriate language while uploading them to XTRF Platform - the final documents can be then generated in a required language.

This article instructs you how to get a package with already ready-to-use Document Templates and upload them to the Home Portal in XTRF Language Business Platform. Afterwards you can use them to generate the final documents for clients and vendors.

#### Before Reading a Guide

- The steps without any marking are mandatory to perform because they ensure carrying on a proper function of the Home Portal.
- The steps marked with the (Optional) label give you information about settings useful for you in terms of fulfilling specific requirements for your projects, but if you skip them it will have no negative effect on the function of the Home Portal.

#### Semantics in Terms of Document Templates

In the article the following semantics is applied regarding the Business Intelligence and Reporting Tools (BIRT) version used to prepare Document Templates :

- BIRT-4 version: The abbreviation of Business Intelligence and Reporting Tools (BIRT) Luna software project, Release 4.4.0. You can download the BIRT-4 version project package from the XTRF repository: <https://repo.xtrf.eu/soft/tools/eclipse/>, `eclipse-birt4.zip` file. For more information go to the official Eclipse website: <https://projects.eclipse.org/projects/birt/releases/4.4.0>.

#### Link to the external page














BIRT software project: <http://eclipse.org/birt/about/>

## I. Download the Document Template Files Package

To get a package with a default set of Document Templates prepared with the BIRT-4 version, perform the following steps:

1	Go to the XTRF repository location that was provided by us. . <div style="border: 1px solid orange; padding: 5px; margin: 5px 0;">Gaining Access to the XTRF Repository Mind that the XTRF repository is password-protected. To gain access to the XTRF repository, please contact the <a href="#">XTRF Support Team</a> to get the current password.</div>
2	From the XTRF repository download the <code>templates_2015_birt4.zip</code> package and store it on your local machine. .
3	Extract the <code>templates_2015_birt4.zip</code> package locally. The default folder name after unzipping the package is <code>templates_en_2015_birt4</code> . .

- 4 . On your local machine go to the `\templates_en_2015_birt4\1.0.x\PDF` folder; where `x` means the version of the downloaded package, for example `1.0.13`. You should see the following set of `*.rptdesign` files:

 CustomerCharges.rptdesign	Plik RPTDESIGN
 CustomerClaim.rptdesign	Plik RPTDESIGN
 CustomerDraftInvoice.rptdesign	Plik RPTDESIGN
 CustomerFinalInvoice.rptdesign	Plik RPTDESIGN
 CustomerProjectConfirmation.rptd...	Plik RPTDESIGN
 CustomerQuoteConfirmation.rptd...	Plik RPTDESIGN
 CustomerQuoteTaskConfirmation....	Plik RPTDESIGN
 CustomerTaskConfirmation.rptdes...	Plik RPTDESIGN
 InternalNonConformity.rptdesign	Plik RPTDESIGN
 LISAEvaluation.rptdesign	Plik RPTDESIGN
 ProviderInvoiceSpecification.rptde...	Plik RPTDESIGN
 ProviderMultiplePurchaseOrder.rpt...	Plik RPTDESIGN
 ProviderPurchaseOrder.rptdesign	Plik RPTDESIGN

#### BIRT-4 Document Templates

From the XTRF repository you can get the thirteen Document Templates created within the BIRT-4 version. These templates are the most commonly used in XTRF Platform in the business translation process with your partners. You can find there ready-to-use templates for invoices or quote confirmation documents. All templates are prepared in English, although they can be easily localized for a given language available in XTRF Platform.

## II. Upload a Document Template

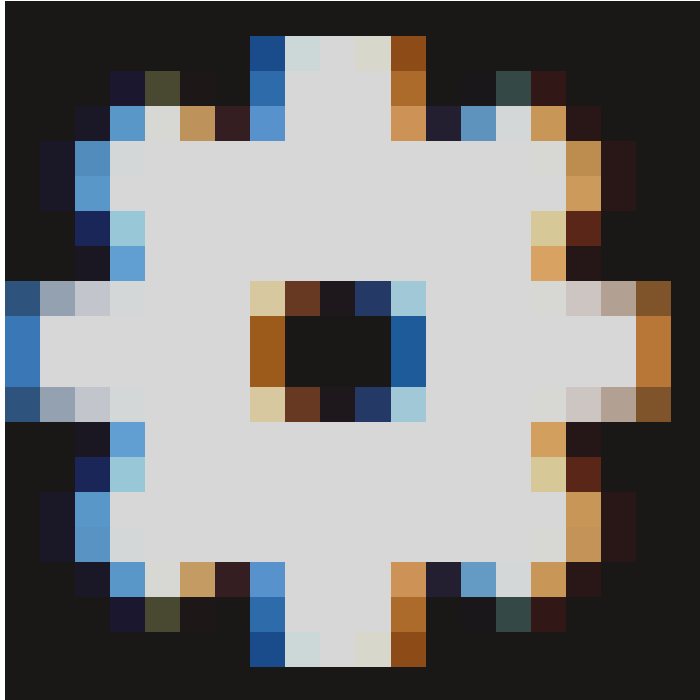
To upload a Document Template to XTRF Platform and afterwards, to be able to generate documents in the `PDF` and `DOCX` formats in the Home Portal, follow the steps:

#### Ready Document Template Files

Please mind that the following steps instruct you how to upload Document Templates prepared within BIRT-4 version. Because the Document Templates are not built-in to XTRF Platform, therefore you need to have ready-to-use Document Templates files stored on your local machine before start performing the following steps.

1. Sign in to the Home Portal of XTRF Platform.

2. Click the



icon.

3. In the accordion menu click the Templates and then select the Document Templates.

4. Click the +Add button. You are redirected to the Create Document Templates display.

5. Provide a name of a template you are going to upload. For example, Customer Charges EN-US.

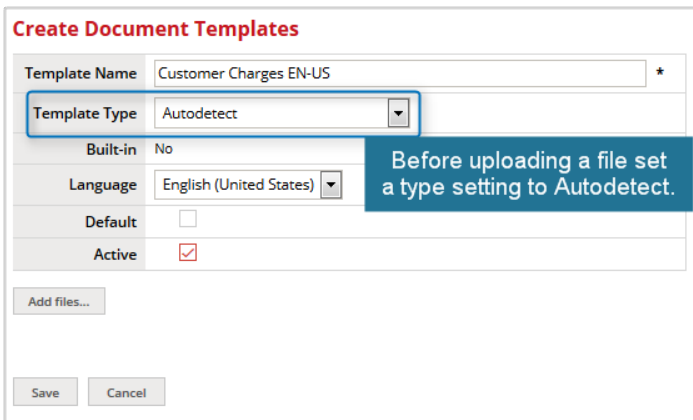
#### Document Templates Localization Names

It is highly recommended to add a localization symbol to a Document Template name if you want to have a given kind of Document Templates for more than one language. The most important reason for that is that you need to add a Document Template entity for each required language to have the Document Template localized.

6. Set a type setting to the Autodetect value from the Template Type drop-down menu.

#### Autodetecting Template Type

It is highly recommended to set the Template Type setting to a Autodetect value. XTRF Platform recognizes the files which are going to be attached for a given Document Template. If you select other option, please mind that you might experience issues while managing Document Templates files. For example, the preview of the document might be unavailable.



The screenshot shows a form titled "Create Document Templates". The "Template Name" field contains "Customer Charges EN-US". The "Template Type" dropdown menu is open and set to "Autodetect". Other fields include "Built-in" (No), "Language" (English (United States)), "Default" (unchecked), and "Active" (checked). A blue callout box with white text says "Before uploading a file set a type setting to Autodetect." Below the form are "Add files...", "Save", and "Cancel" buttons.

7. Select a language in which you are going to use a given Document Template.

#### Document Template Language

It is highly recommended to select a language in which you want a given Document Template to get localized. For example, if you want to use your Document Template for German documents, you need to select a German language. After uploading the Document Template and saving all changes your Document Template might be used to generate documents for your partners in German. Please note that the automatic localization of your Document Templates is only executable for the languages defined in XTRF Platform.

8. (Optional) Select the Default checkbox if this Document Template for a selected language should be used as a default one in your Home Portal.

#### Default Document Templates

Please mind that the Document Template is highly correlated with the Language option. In XTRF Platform in the Document Templates Settings tab you can select which language version of the built-in templates should be set as default from the Default Documents Language drop-down menu. For example, if you select the German language, all built-in templates in German language are set as the default ones. When setting up the Default checkbox for a given Document Template for a selected language you need to take into account that there are two factors influencing in which language the Document Template is going to be displayed:

- The global language setting set up for all Document Templates
- The language setting set up for a Document Template

When you add a Document Template to the Home Portal selecting the Default checkbox, your Document Template is going to be added to the list with the default templates, although the language setting might differ from the global one.

9. Select the Active checkbox if this Document Template should be available for use in your Home Portal.

10. To upload the desired Document Template file, follow the steps:

- a. Click the Add files... button. The file manager window available on your local machine appears.
- b. Select the Document Template file you want to upload to XTRF Platform. The file format of the uploaded file should look as follows: `DocumentTemplateFilename.rptdesign`. The names of the attached file should appear in the Create Document Template display.

Please mind that you can upload only one `DocumentTemplateFilename.rptdesign` file while adding a new Document Templates to XTRF Platform.

**Create Document Templates**

Template Name: Customer Charges EN-US

Template Type: Client Account Statement

Built-in: No

Language: English (United States)

Default:

Active:

Add files...

CustomerCharges.rptdesign(185,465 bytes)

Save Cancel

The Customer Charges Document Template has been added.

Click the Save button. You have just added the Customer Charges Document Template to your bunch of the Document Templates.

### Generating Documents in the DOCX Format

If you want to enable you or your employees to generate documents in the docx format you can easily accomplish it by setting up the DOCX setting from the Output Format drop-down menu.

### Generating Documents in Many Languages

Please bear in mind that if you want to have the same document available in many languages you need to upload the Document Template for each language separately.

## Tips and Tricks

To find more information on the Document Templates topic, go to the following articles:

- Basic Definition:
  - [Document Template Definition](#)
- User's Guides:
  - [Customizing Your BIRT-4 Document Template](#)
- XTRF Modules Context-Sensitive Help:
  - [Create Document Templates](#)
  - [Document Templates Browse](#)