Customizing Your BIRT-4 Document Template

Target audience: Developers
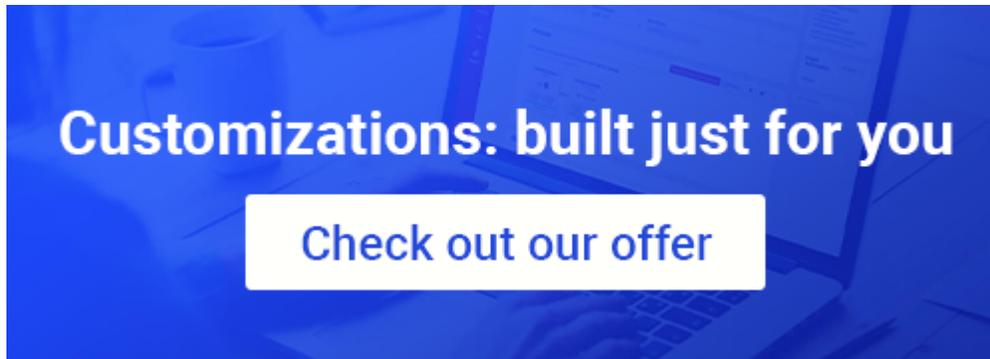
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In XTRF Platform you can incorporate a set of Document Templates which are built with the BIRT-4 software project. This set contains the Document Templates which are the most commonly used in the translation process, for example the template of quote confirmation or customer invoice document. However, you might want to customize the available templates to finally get the personalized set of documents adjusted to your and your partners needs. This requires to get familiar with the Eclipse environment and have knowledge of incorporating information from the delivered libraries package . The purpose of this article is to show you how to set up your Report Design Project in Eclipse and make a desired Document Template ready to get modified. Please bear in mind that after all changes haven been made, you need to add the customized Document Templates to XTRF Language Business Platform.

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/
Download BIRT: http://download.eclipse.org/birt/downloads/

Customize a Document Template

The delivered XTRF Document Templates can be adjusted to your requirements in terms of:

- Information which is displayed in a document
- Style of a document.

In the following scenario you can find how to set up your Eclipse environment, run your Report Design project, and apply changes to the existing Document Template.

I. Download the Files Package

To get a package with a default set of Document Templates prepared with BIRT-4 version and `*.rptlibrary` libraries which are necessary to use reporting environment in BIRT, perform the following steps:

1.	Go to the XTRF repository location that was provided by us.
	Gaining Access to the XTRF Repository Mind that the XTRF repository is password-protected. To gain access to the XTRF repository, please contact the XTRF Support Team to get the current password.

2.	From the XTRF repository download the `templates_2015_birt4.zip` package and store it on your local machine.
3.	Extract the `templates_2015_birt4.zip` package locally. The default folder name after unzipping the package is `templates_en_2015_birt4`.
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
InternalNonConfirmity.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.

Libraries in BIRT
Besides the set of Document Templates you can find a package of `*.rptlibrary` files in the `\templates_en_2015_birt4\1.0.x\LIBS` folder; where `x` stands for the version of the downloaded package, for example `1.0.13`. The files are the XTRF library files within customized reporting components which are used in XTRF Platform. In the libraries the most commonly used functions and report items are encapsulated to reduce time spent on redesigning template layout. This enables you to use the library reporting components at any time and also share them with other people working with BIRT. The picture below presents a list of customized BIRT libraries included in the `templates_2015_birt4.zip` package to comfortably apply schemas in your Document Templates:
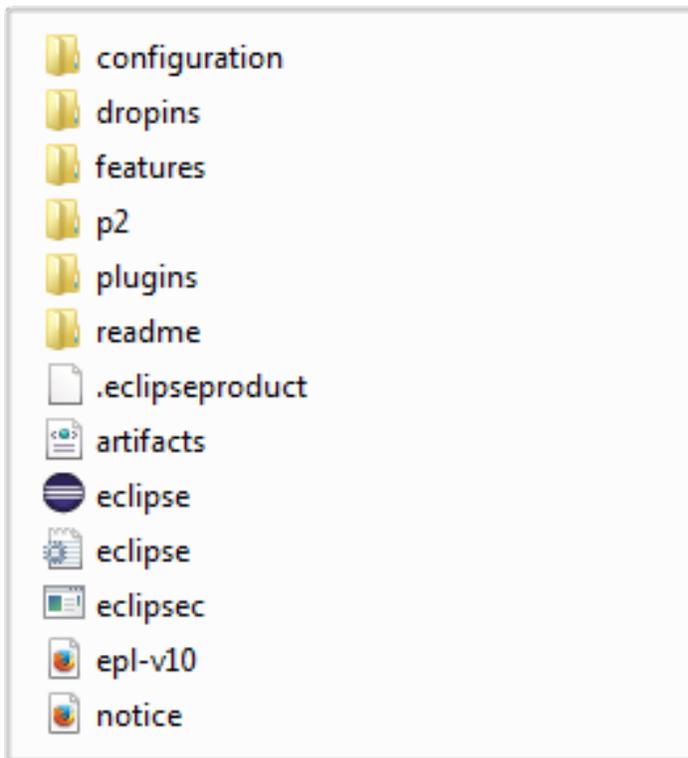
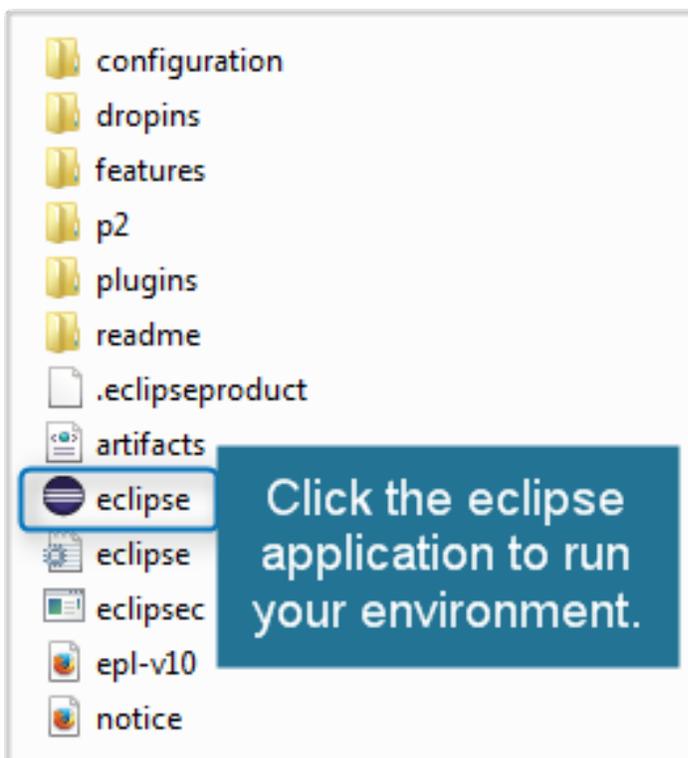| commonLib.rptlibrary	Plik RPTLIBRARY
customerChargesLib.rptlibrary	Plik RPTLIBRARY
customerDraftInvoiceLib.rptlibrary	Plik RPTLIBRARY
customerInvoiceLib.rptlibrary	Plik RPTLIBRARY
internalNonConfirmityLib.rptlibrary	Plik RPTLIBRARY
lisaEvaluationLib.rptlibrary	Plik RPTLIBRARY
projectConfirmationLib.rptlibrary	Plik RPTLIBRARY
providerInvoiceSpecificationLib.rpt...	Plik RPTLIBRARY
providerMultiplePurchaseOrderLib....	Plik RPTLIBRARY
providerPurchaseOrderLib.rptlibrary	Plik RPTLIBRARY
taskConfirmationLib.rptlibrary	Plik RPTLIBRARY
taskFeedbackLib.rptlibrary	Plik RPTLIBRARY

II. Prepare the Eclipse Environment

To work on the Document Templates and adjust them to your needs, first you need to download the appropriate Eclipse package, unpack it and set up your Eclipse environment on your local machine. The following steps guide you how to do it:

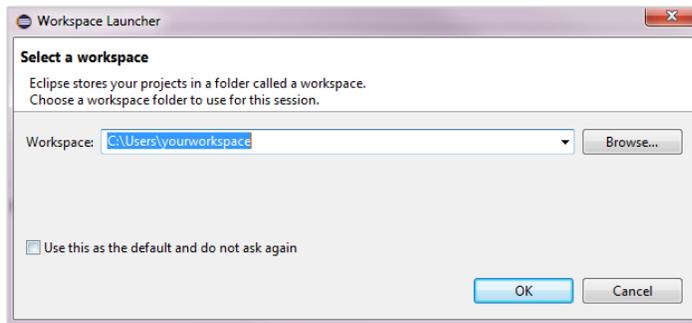| 1.	Go to the XTRF repository that was provided by us.
	Gaining Access to the XTRF Repository Mind that the XTRF repository is password-protected. To gain access to the XTRF repository, please contact the XTRF Support Team to get the current password.
2.	From the XTRF repository download the `eclipse-birt4.zip` package and store it on your local machine.
3.	Extract the `eclipse-birt4.zip` package locally. The default folder name after unzipping the package is `eclipse`.

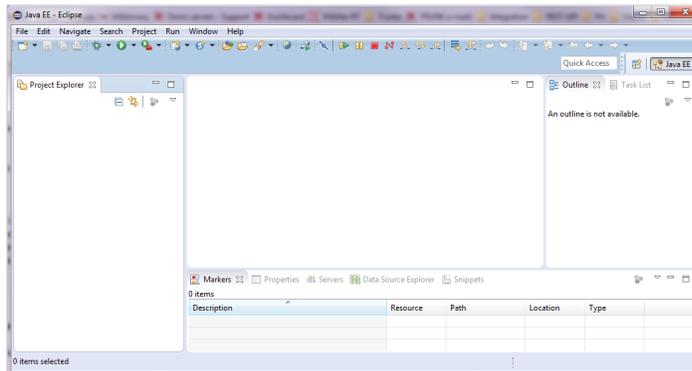| 4.	On your local machine go to the newly unpacked `\eclipse\` folder. You should see the files as follows:
	configuration dropins features p2 plugins readme .eclipseproduct artifacts eclipse eclipse eclipsec epl-v10 notice
5.	Click the eclipse icon to run your Eclipse environment. The Workspace Launcher pop-up window from the Eclipse software project appears.
	configuration dropins features p2 plugins readme .eclipseproduct artifacts eclipse Click the eclipse eclipse application to run eclipsec your environment. epl-v10 notice

| 6.	Select a workspace for your project, for example yourworkspace. The Java EE -Eclipse window appears.
7.	Close the Welcome tab in the Java EE -Eclipse window. The Java EE -Eclipse window appears.
8.	Select the Window > Show View > Other... in the Java EE -Eclipse menu. The Show View pop-up window appears.
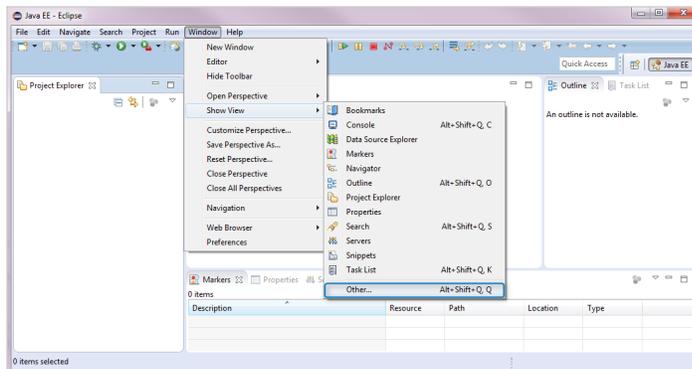
9.	In the explorer tree of the Show View pop-up window:
	a. Select the Report Design > Property Editor subbranch.
	b. Click the Ok button.
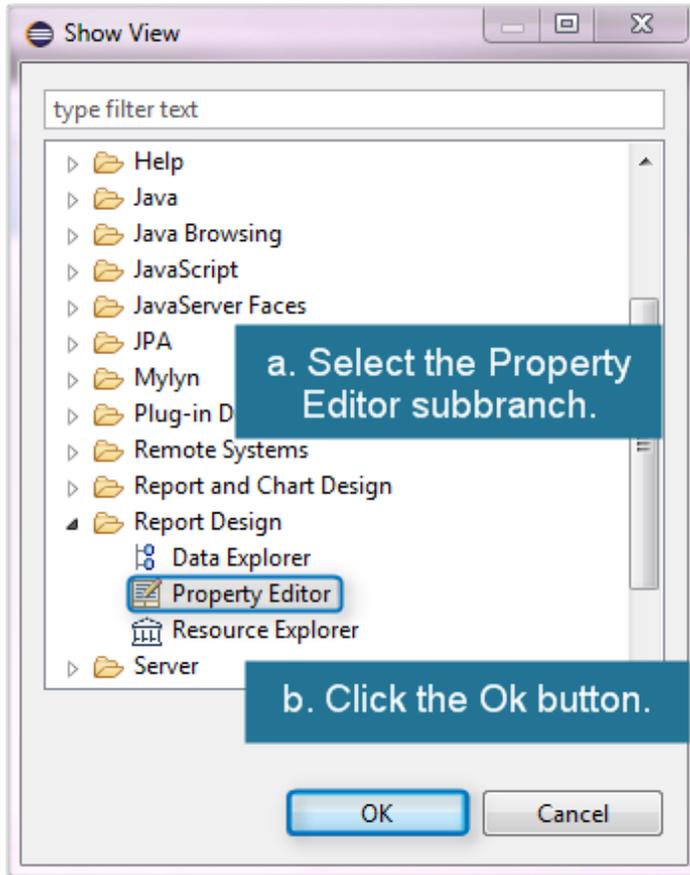
10.	You have just prepared your Eclipse environment:
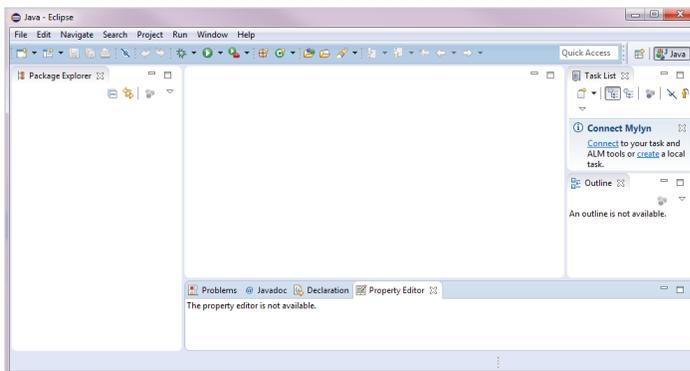
III. Run Your Report Design Project

In Eclipse you can use project perspectives to structure your files and simultaneously have access to project management tools. It enables you to conveniently edit the selected Document Template and simplify the process of deploying it. In this section you are going to learn how to get your desired Document Template prepared for customization within the Report Design perspective:

|	
1.	Select the File > New > Project in the Java - Eclipse window. The New Project pop-up window appears.
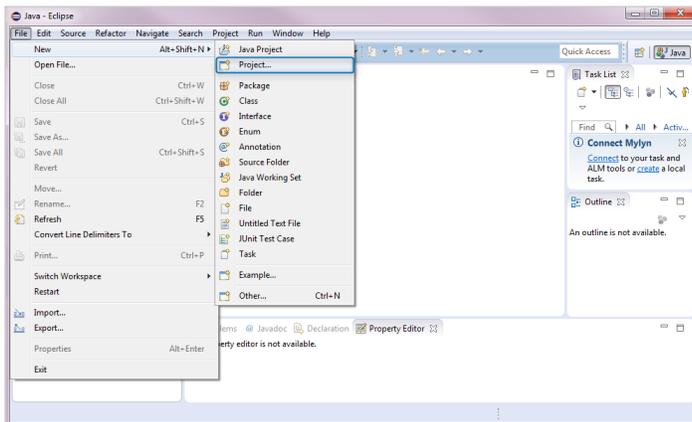
2.	In the New Project pop-up window:
	
	   a. In the explorer tree select the Business Intelligence and Reporting Tools > Report Project subbranch.
	   b. Click the Next button. You are redirected to the Report Project display.
	   c. Provide the name of your project in the Project name field, for example Document Templates.
	   d. Unselect the Use default location checkbox - it enables you to define a location of your report project.
	   e. Click the Browse button. The file manager window available on your local machine appears.
	      i. Select the `\templates_en_2015_birt4\1.0.x\` folder - you can find it in the unzipped `\templates_en_2015_birt4\` folder containing the `*.rptlibrary` and `*.rptdesign` files; where `x` stands for the version of the downloaded package, for example `1.0.13`.
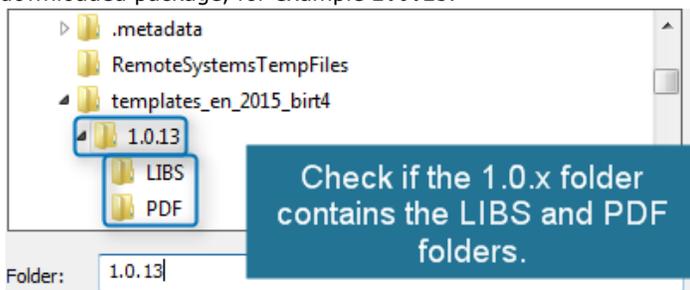	
	      ii. Click the Ok button. The file manager window closes.
	   f. The selected location of the files appears in the Location field in the Report Project display.
	   g. Click the Finish button. The New Project pop-up window closes.
	
	Open Associated Perspective Pop-up Window
	It might happen that when the New Project pop-up window closes, the Open Associated Perspective? pop-window appears asking you if you want to open the perspective in this moment. Click the Yes button to continue opening your report project.

3.	You have just opened the report project in Eclipse within the Document Templates you have downloaded from the XTRF repository.
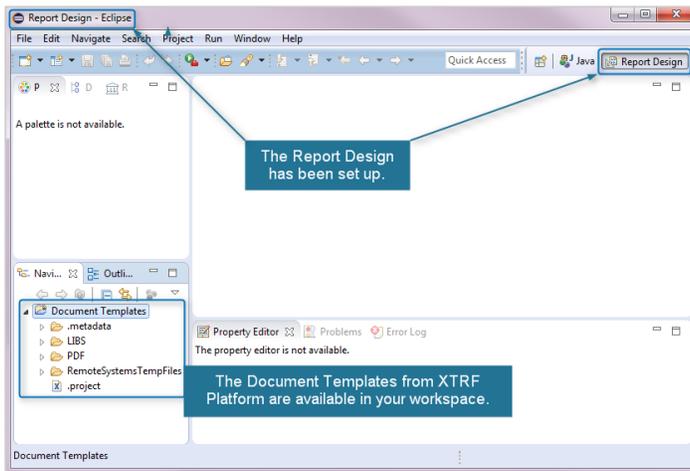
4.	Click the PDF branch in the Navigator panel in the Report Design in Eclipse. You can see the set of XTRF Document Templates:
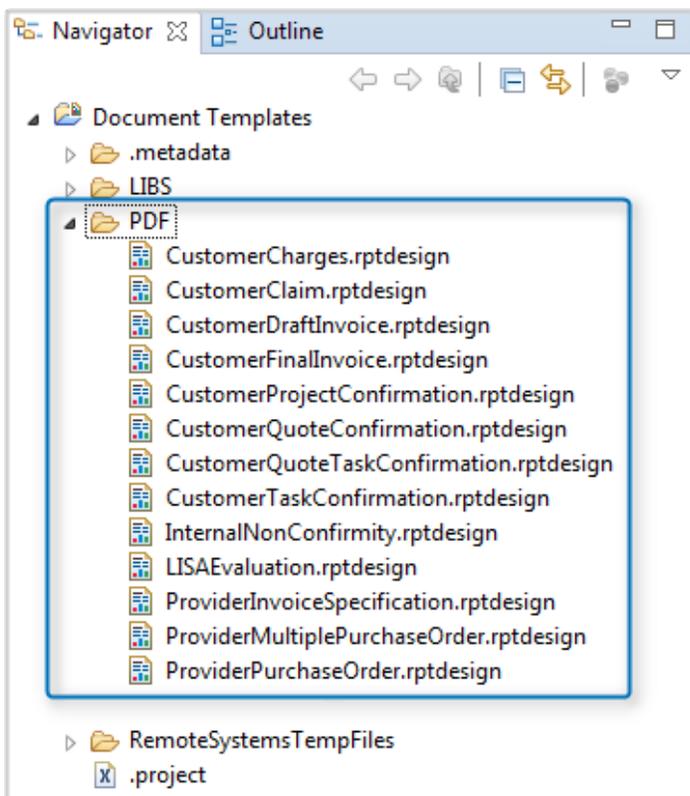
Link to the external page
BIRT Reporter Designer: http://eclipse.org/birt/about/designer.php

IV. Edit the Document Template

When your Eclipse environment is set up, you are able to modify both, the content of displayed information and the layout of the

Document Template. The very first step is accessing the required Document Template in the editable format in the Eclipse project; then, you can customize the desired Document Template.
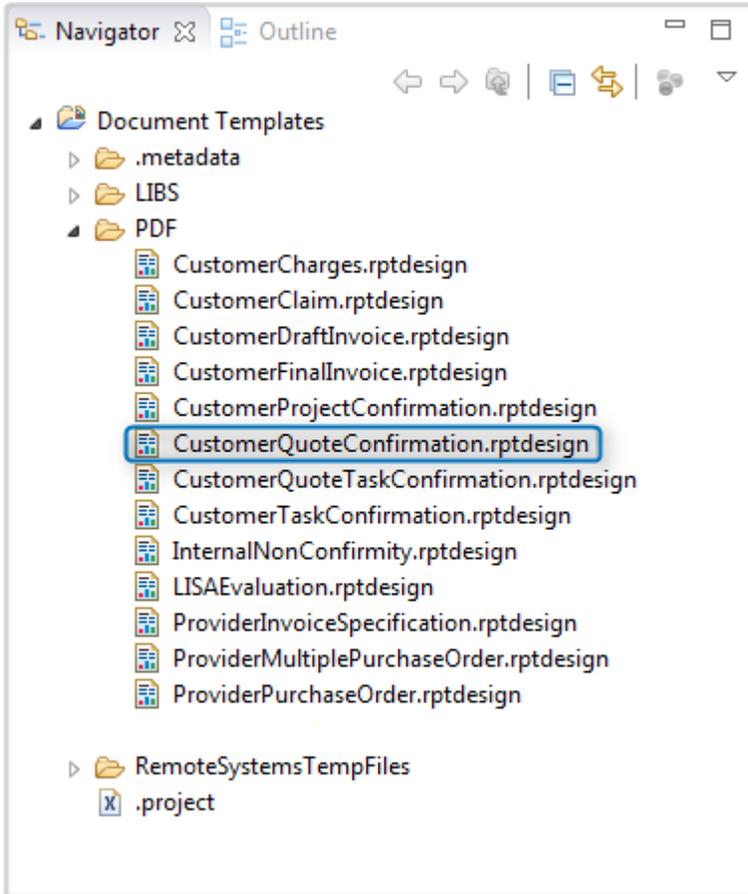
In the Navigator panel select the Document Template you are about to modify. In this guide the `CustomerQuoteConfirmation.rptdesign` file is selected. The Customer Quote Confirmation Document Template is displayed. You can modify the selected Document Template using settings delivered within Eclipse.

IV.I. Modify the Content of Your Document Template

To personalize the content of the Document Template you can do it within the embedded `*.rptlibrary` libraries. Each Document Template encapsulates particular libraries what enables you to simply drag and drop an item to add it to the report. First of all, you need to know which libraries are used for each template; next, you can use the report items available in the known libraries to change the content of a given Document Template. The following steps present you how to add a report component to the Customer Quote Confirmation Document Template:

> Document Templates Common Library
> Each Document Template which you have downloaded from the XTRF repository encapsulates the `commonLib.rptlibrary` file. Therefore, you can use the report items delivered within this library in each of the Document Templates.

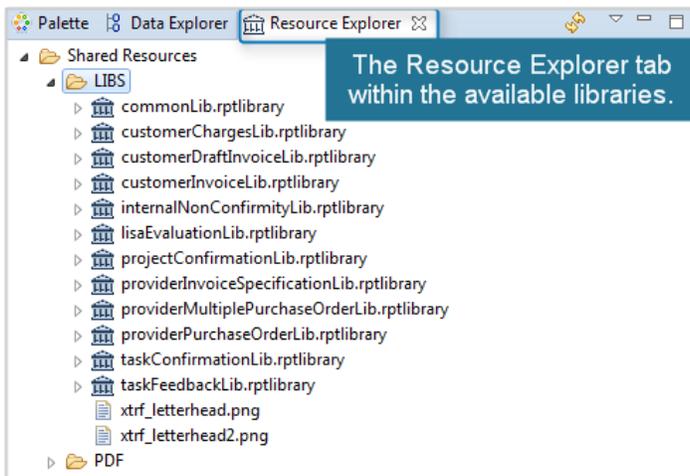| 1.	When you have edited the Customer Quote Confirmation Document Template in the Eclipse window, click the XML Source tab. You can see the Document Template as the `.XML` file.

2.	Find the libraries property in the given `DocumentTemplate.rptdesign` file. You can find out which libraries are encapsulated for the Document Template. In this guide the `CustomerQuoteConfirmation.rptdesign` file is given as an example: you can see that the following libraries are added: • The `projectConfirmationLib.rptlibrary` file • The `commonLib.rptlibrary` file. CustomerQuoteConfirmation.rptdesign ``` <list-property name="libraries"> <structure> <property name="fileName">libs/1.0.13/projectConfirmationLib.rptlibrary</property> <property name="namespace">projectConfirmationLib</property> </structure> <structure> <property name="fileName">libs/1.0.13/commonLib.rptlibrary</property> <property name="namespace">commonLib</property> </structure> </list-property> ```
3.	When you have defined which libraries are used, you can verify which report items are embedded in these libraries. To do so, go to the Resource Explorer tab. You can see all the encapsulated libraries in the LIBS folder.
4.	In the Resource Explorer tab expand a given `*.rptlibrary` file, for example the `commonLib.rptlibrary`.
5.	In the Resource Explorer tab expand the Report Items subbranch. For example, you can see the report components embedded in the `commonLib.rptlibrary` file.

Palette Data Explorer Resource Explorer ⊠

- Shared Resources
  - LIBS
    - commonLib.rptlibrary

The report items available in the commonLib.rptlibrary file.

- Report Items
  - Image - ownerLogo
  - Dynamic Text - branchAddress
  - Dynamic Text - branchCity
  - Dynamic Text - branchCountry
  - Dynamic Text - branchEmail
  - Dynamic Text - branchEuVAT
  - Dynamic Text - branchFax
  - Dynamic Text - branchFullname
  - Dynamic Text - branchName
  - Dynamic Text - branchPhone
  - Dynamic Text - branchWWW
  - Dynamic Text - branchZipCode
  - Dynamic Text - generatedByXTRF
  - Dynamic Text - ownerAddress
  - Dynamic Text - ownerCity
  - Dynamic Text - ownerCountry
  - Dynamic Text - ownerEmail
  - Dynamic Text - ownerEuVAT
  - Dynamic Text - ownerFax
  - Dynamic Text - ownerFullname
  - Dynamic Text - ownerName
  - Dynamic Text - ownerPhone
  - Dynamic Text - ownerWWW
  - Dynamic Text - ownerZipCode
  - Dynamic Text - prefferedLocale
  - Dynamic Text - reportLine1
  - Dynamic Text - reportLine2
  - Dynamic Text - rootObject
  - Dynamic Text - systemCurrency
- MasterPages
- Themes
- Embedded Images
- Libraries
- Scripts
- customerChargesLib.rptlibrary
- customerDraftInvoiceLib.rptlibrary
- customerInvoiceLib.rptlibrary
- internalNonConfirmityLib.rptlibrary
- lisaEvaluationLib.rptlibrary
- projectConfirmationLib.rptlibrary
- providerInvoiceSpecificationLib.rptlibrary
- providerMultiplePurchaseOrderLib.rptlibrary
- providerPurchaseOrderLib.rptlibrary

Accessible Report Itmes The report components which you can use for a given Document Template are these ones which are embedded in the libraries found in the previous steps. In the following example you have found the libraries: `commonLib.rptlibrary` and `projectConfirmationLib.rptlibrary` files. It means that the components available under the Report Items subbranch for the `commonLib.rptlibrary` and `projectConfirmationLib.rptlibrary` files can be used. The components from the other libraries are unavailable.

6.	Select the report component from the Report Item subbranch: drag and drop it to the displayed Document Template.
7.	Select the File > Save in the Report Design menu to store all changes you have made in the Document Template.

IV.II. Modify the Document Templates Properties

Modifying the Document Template properties means changing the layout of the template. You can do it on the spot using the settings available in the Eclipse environment. The following steps instruct you how to find the settings used to change the design of the document layout:

1.	(Optional) To change the properties of your Document Template, follow the steps:
	
	   a. Go to the Property Editor tab at the bottom of the selected Document Template Report Design window.
	   b. In the Properties tab you can find the list of all properties used to adjust the Document Template to your needs.
	
	        General Section in the Properties Tab
	        In the Properties tab you can find all settings which might be used to redesign the look and feel of your Document Templates such as styles, paddings, or borders.

2.	Select the File > Save in the Report Design menu to store all changes you have made.

> Make Your Customized Document Templates Available in XTRF Platform
> When you have saved all changes made in the Document Templates, you need to upload them to XTRF Language Business Platform. To find out how to do it, read the Adding BIRT-4 Type Document Templates article.

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:
  - Adding BIRT-4 Type Document Templates
- XTRF Modules Context-Sensitive Help:
  - Create Document Templates
  - Document Templates Browse