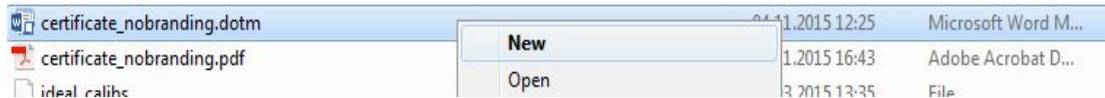


Winose Evolution - Word Report Quickstart Guide

How to use the Microsoft Word Template for Report generation

1. Open a new document based on the template.

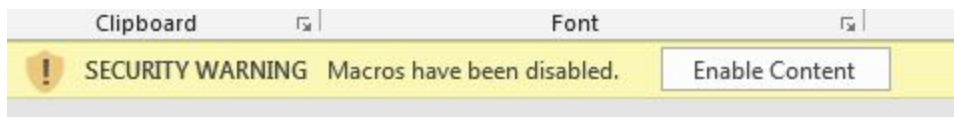
Either right click on the template file in your file explorer or just double click it (since “New” is the default operation). Choose “Open” if you want to edit the template itself.



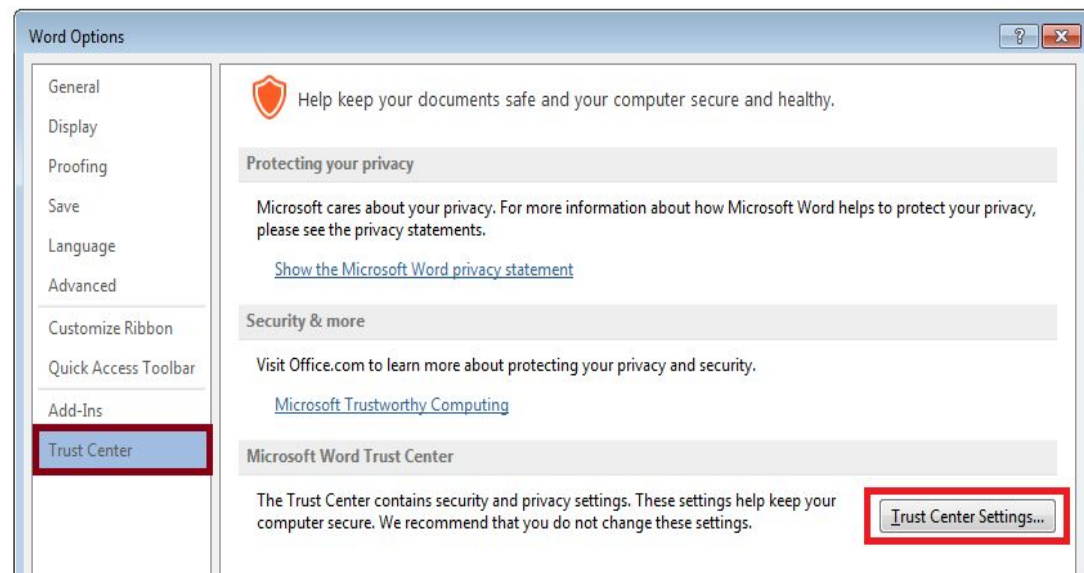
2. Requirements/Setting up Word

Enable Macro Support, there are several ways to do so

- while opening the document, you might be automatically prompted to enable macros, click the “Enable Content” button:



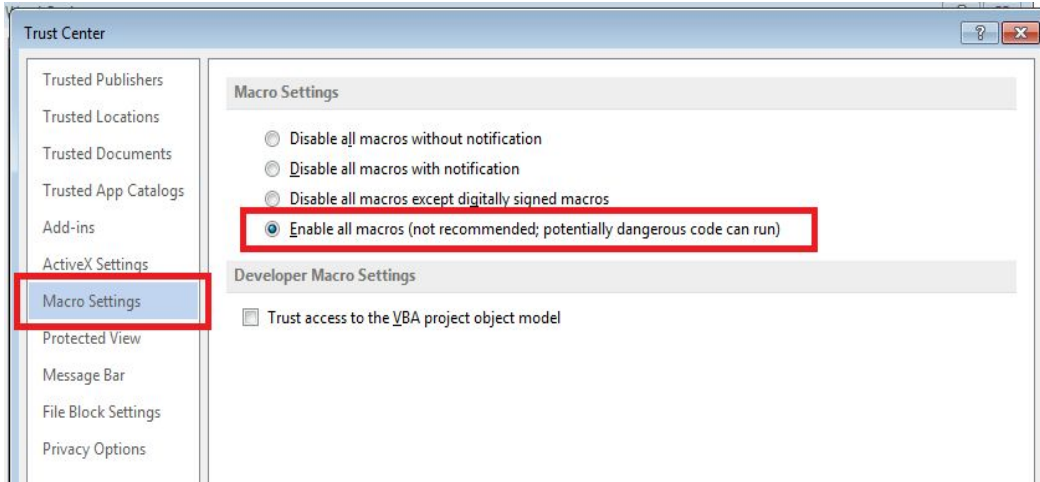
- otherwise, Macro support is disabled per default. Navigate into the Word Options Menu and open the “Trust Center Settings”



Now use one of the following options:

Option A

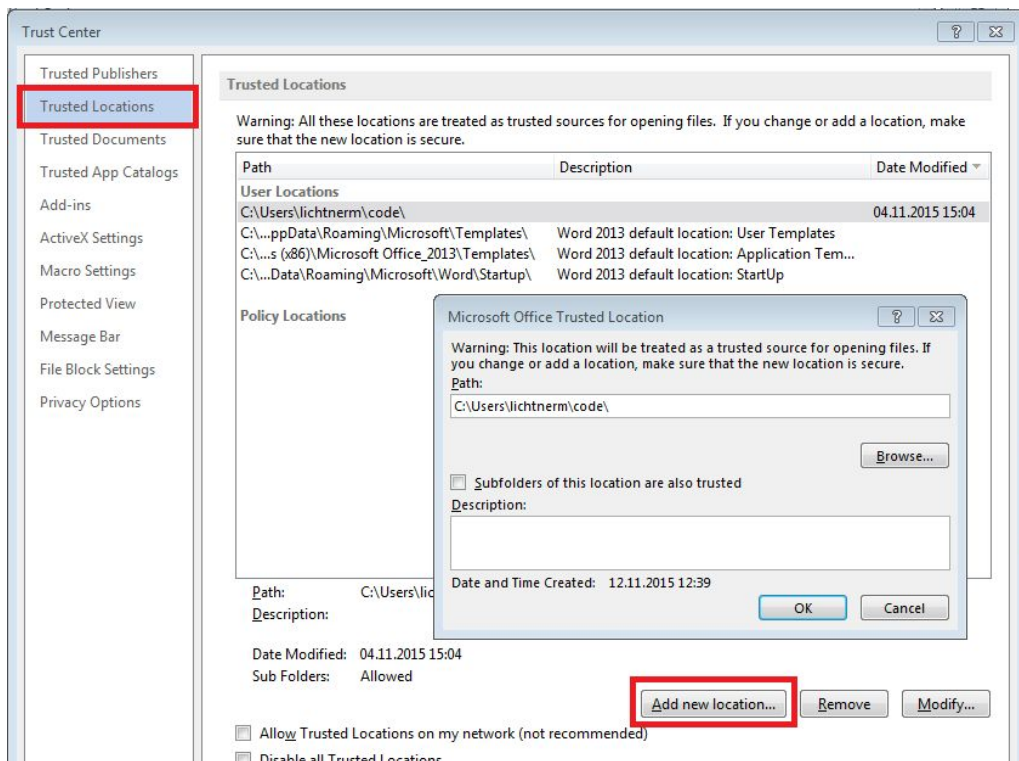
Enable all macros



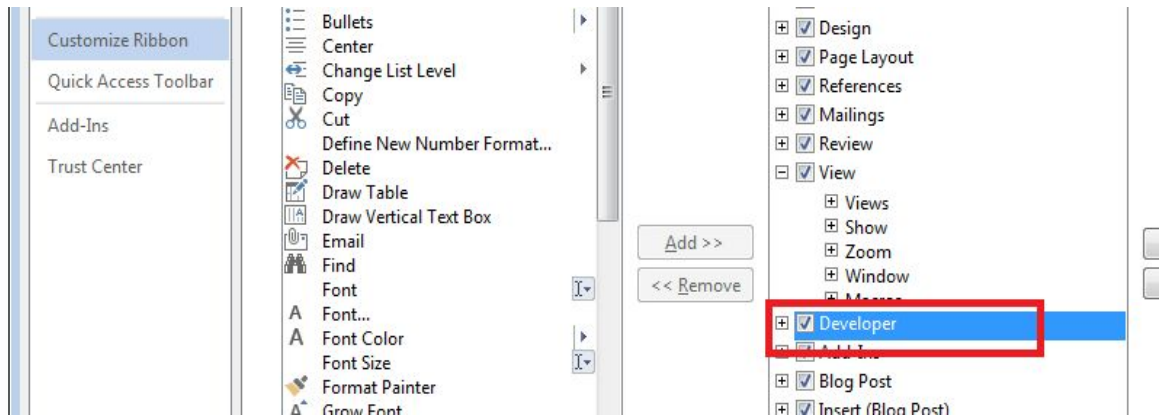
Option B

Place the template or document in a specific location and provide full trust towards this location

You might have to reopen the template/restart word to apply this change.



Enable the Developer Ribbon for easier access to the content controls.

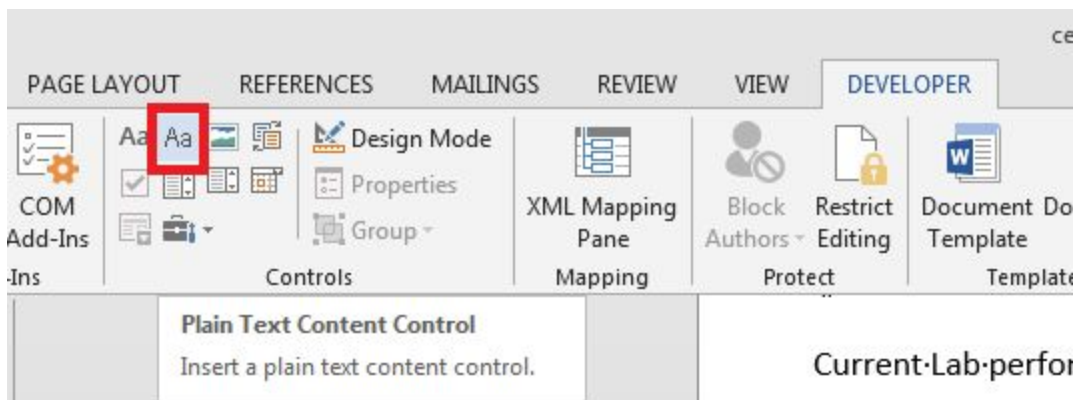


3. Adding custom layout and content

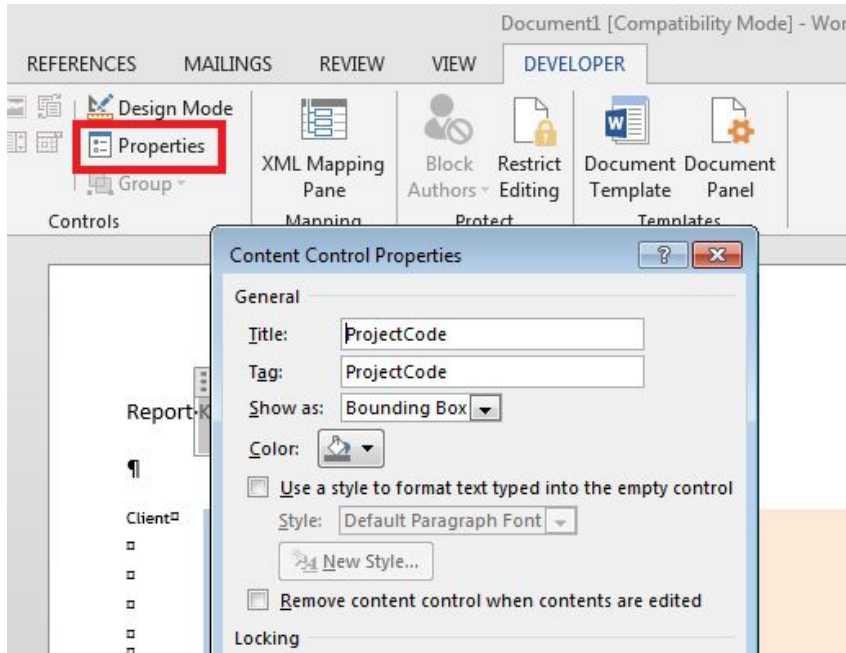
The Word Template relies on two concepts to automatically fill reports. The first is a couple of named “Content Controls”, the second is the assumption that your main results are displayed using a table. That means in order to use the template, your customized template needs to contain at least one table and an arbitrary amount of named content controls. Note that only the table is required, you may choose to use none of the named text content controls.

Adding a “Content Control”

Open the developer ribbon and choose the “Plain Text Control”, which inserts a new Text Content Control at the location of your cursor.



The various text content controls are identified by their title, this way the macro behind the scenes knows where it should insert what kind of information. To change the title of a control, select it and choose “Properties” from the Developer Ribbon.



4. List of supported Text Fields/Controls

The first column names the title that must be given to the control. Have a look at the generic example template to see how it's supposed to work.

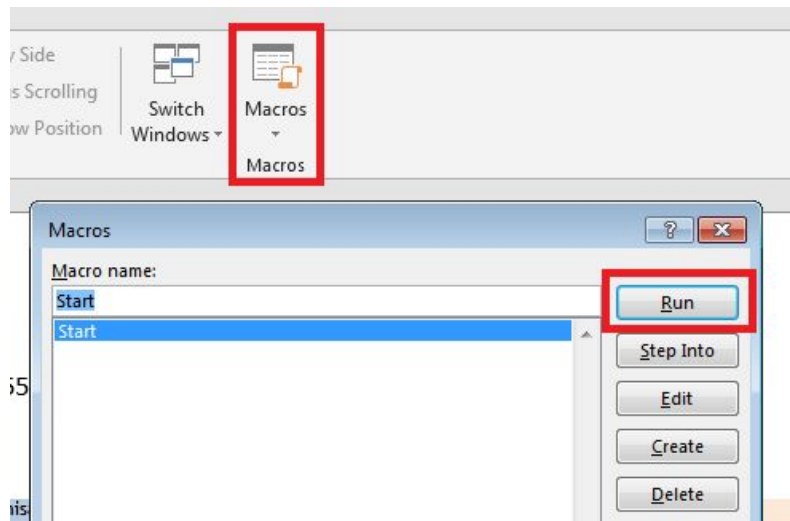
ClientName	Filled with the name of the Client
ProjectContact	Full name of the project related contact person, if assigned
ProjectReference	The internal reference for this project
LabR, LabA	Lab Performance, Accuracy and Repeatability (at the time of creating the report)
ClientAddr_Street	Client office street the project belongs to
ClientAddr_ZipCity	Zip Code and City of the client office the project belongs to
ClientAddr_Country	Country of the client office the project belongs to
ClientPhone	Client office phone number
ProjectCode	Project name
Operator	List of all lab operators which took part in the measurements.
SignatureImage	Signature image of whoever is filling out the report (and thus providing his/her login details). This is set within the user details of that particular user.

SignerName	Full name of the user filling out the report.
SignerTitle	Position/Job title of the user filling out the report.

Each field is allowed to appear multiple times. Position and format each text control the way you like it.

Filling a Report

Start the report interface by navigating into the “View” Ribbon, click Macros and select the “Start” Macro.



The report generation interface is divided into different subsections, which are explained in the following sections.

- **Control**
 - “Fill report” - fills the word document with the provided settings
 - “Clear fields” - resets all text content controls (with the appropriate titles, this will not affect any unknown text fields) and clears the main result table.
 - Reload/Store settings - Saves or restores all settings (except the Winose password) on the local computer you’re running Word on.
- **Winose settings**

This section holds the information necessary to access your Winose. The user information provided here will be used to fill in the signature/signer related fields.
- **Project list**

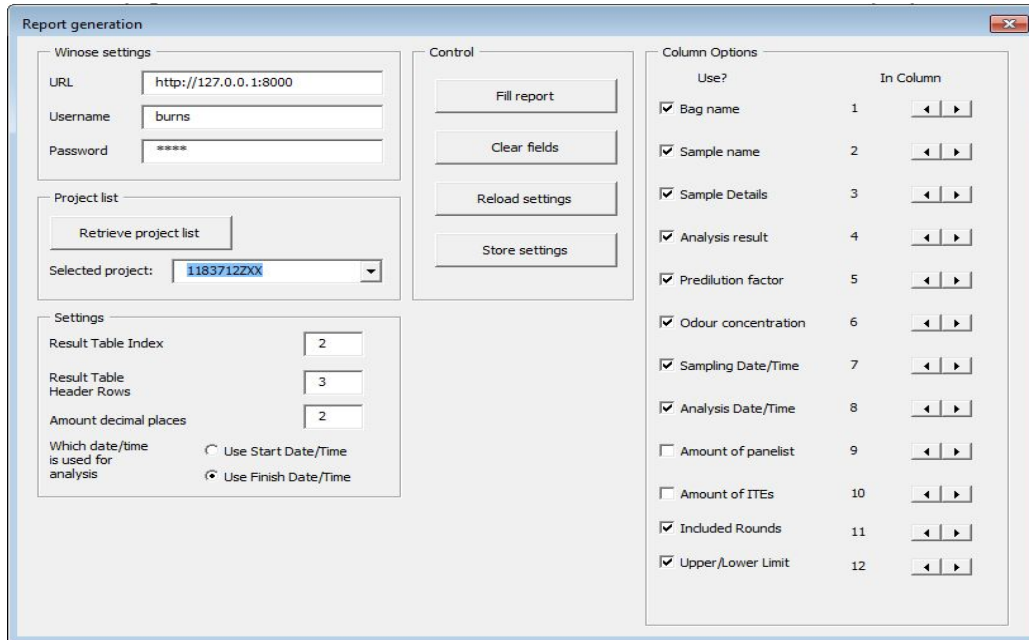
After filling in the Winose settings, click “Retrieve project list” to fill the selection box with a list of all available and active projects in your Winose system. Select the project you want to generate a report for here.
- **Settings**

The fields “Result Table Index” and “Result Table Header Rows” help the macro to locate your main result table. The macro finds the result table by simply using the nth table within the document (not counting tables within tables). The “Result Table Header

Rows” controls at which rows in that table results should be inserted, every row above the row specified are thus treated as a heading. The first non-header row of the (empty) table should already be present, in order to reuse the formatting for each new row. The setting “Decimal places” affects the rounding behaviour for analysis results, while the analysis date/time controls if the end or start date/time gets inserted

- **Column Options**

For more fine grained control, you can activate or deactivate single data columns and reorder them within the result table. Make sure your table has enough columns.



Before actually filling in the document, the macro does a couple of checks to verify if everything is correct, e.g. the specified table is present and has enough columns. If you encounter any error, verify your settings within the template itself as well as within the macro user interface.

Sorting

Sorting the result table can be done by Word itself, instead of offering several dozen sorting options via the macro. Refer to to this guide:

<https://support.office.com/en-us/article/Sort-the-contents-of-a-table-f8392477-4613-49cd-aba6-7c2e48f1d91f>

Also make sure to mark the headers of your table. Select the full rows of your header, select Layout below Table Tools from the menu and click “Repeat Header Rows”. This ensures the header gets repeated on page breaks, as well as excludes those rows from sorting.

