Introduction

Welcome to OnlineReports and this manual which contains a description of the most common functions that are needed when working with OnlineReports. Before digging into the details we´d like you to take note of the following basic information.

1. **Web browsers**

   - Umbraco works with all browsers.

   - However, the editor tool is optimized for the Chrome and Edge browsers.

2. **The default language in this version is Swedish meaning that certain basic settings are set in the Swedish version**

   - Copy report

   - Upload translation file

   - Navigation redirects

Logga in, navigate edit content in OnlineReports

Login

To log in to Onlinereports, use the link provided, the username and password provided by your contact person. Usually the link is: reports.customername.com/umbraco.

Editor Interface

After logging into edit mode, the following content is displayed in the browser. At the top there is a menu where you will find various functions.
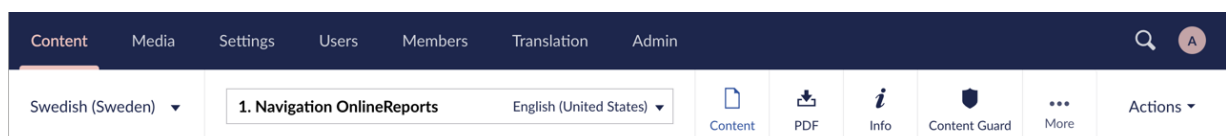
The main functions used are

**"Content"** is the space in which you create and edit your content.

"Media" is a database upload excelfiles, documents and images.

"Content panel"

On the left side of the window is the content panel, which displays the site's content as a tree structure.

Here you find all the reports you have access to. The right side of the window shows either the current page or (as below) the home page in edit mode.
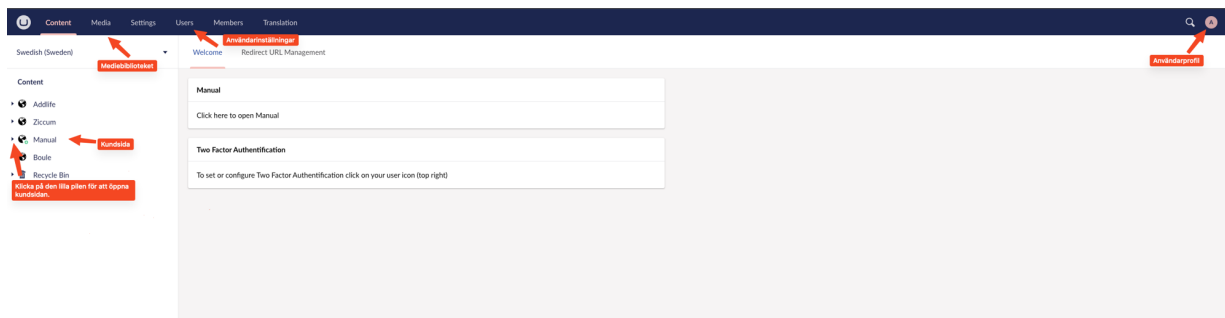

Media:
The media library acts as the website's hard drive, where you can upload any files used on the website, such as images, PDFs, Excel files or movies.

Content :
In "Content" you manage the website's content. Here you add text and links to images, PDF files, Excel files or movies that have been uploaded to the media library.

Preview :
Pressing "Preview" will open the preview box where you can select the language version you want to see. Click on the desired link to open a new tab in the browser and see how the web page will look.
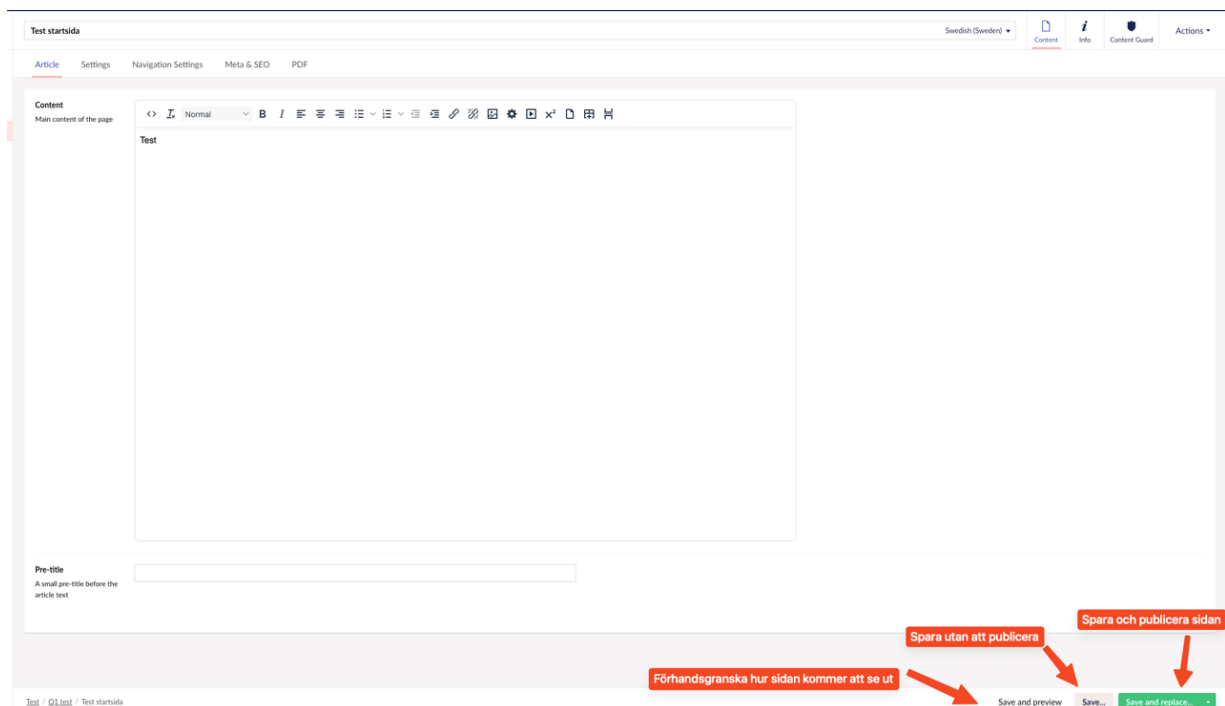
If your report is password protected, you will need to log in again. Enter your username (email address) and password, the same as for entering Onlinereports.

Overview Editor buttons in Content
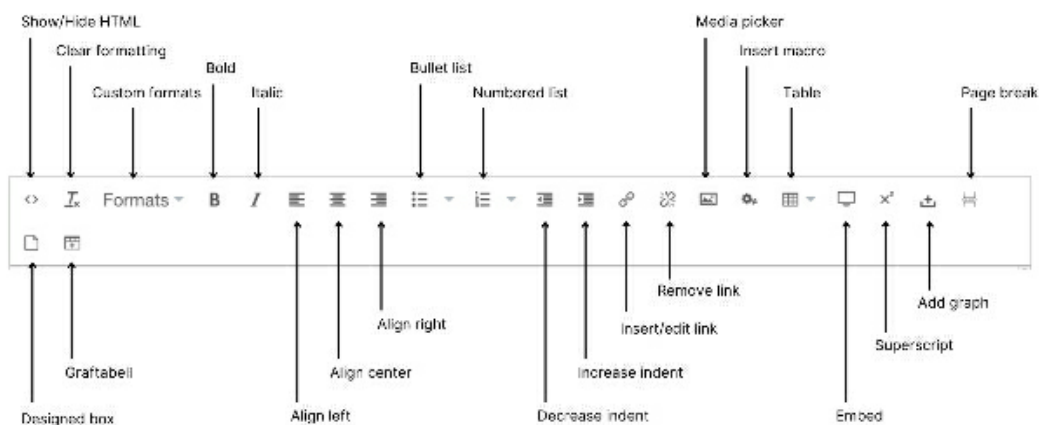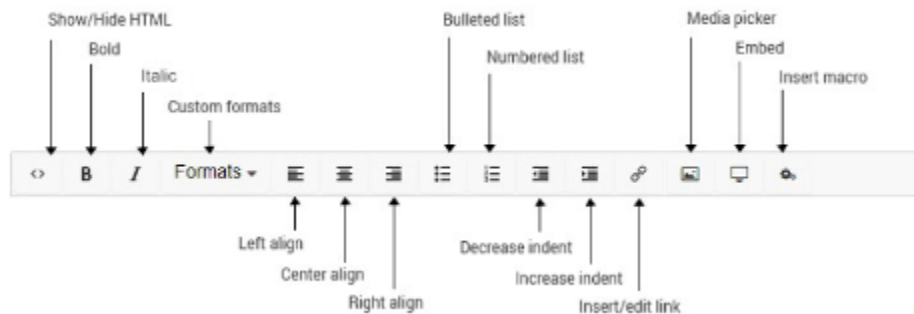
Manage the content structure

Create, save and publish a page

1. Go to Content Navigate to "Content".

2. Select the correct location for the new page hover over the header of the page where the new page should be located. Click the three dots next to the title, then select "Create" from the context menu. You have several different page types to choose from:

- Report: Create a new report by hovering over the customer page and then create pages below the report to build the tree structure.
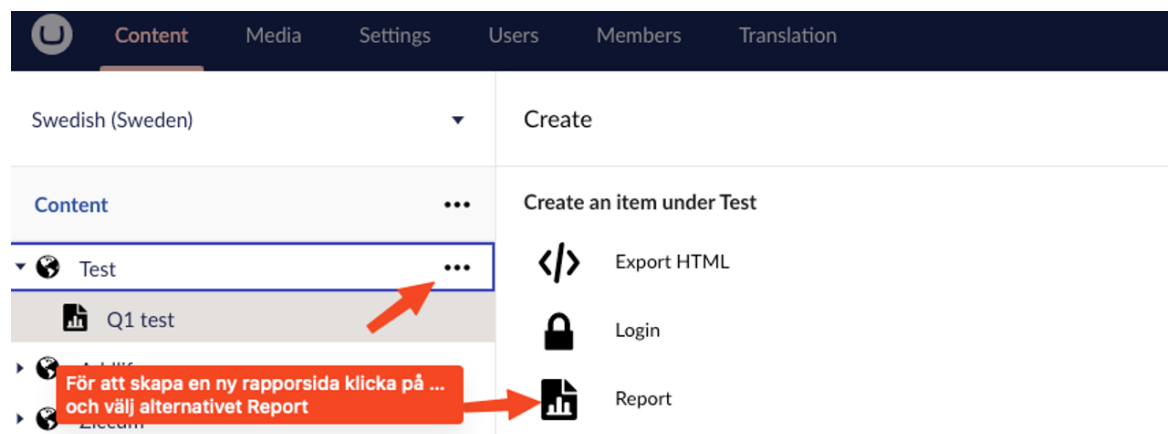
- Home page: Post a home page below the report. There is only one home page per report.

- Article Page: Use this page primarily to build your OnlineReport during the report.
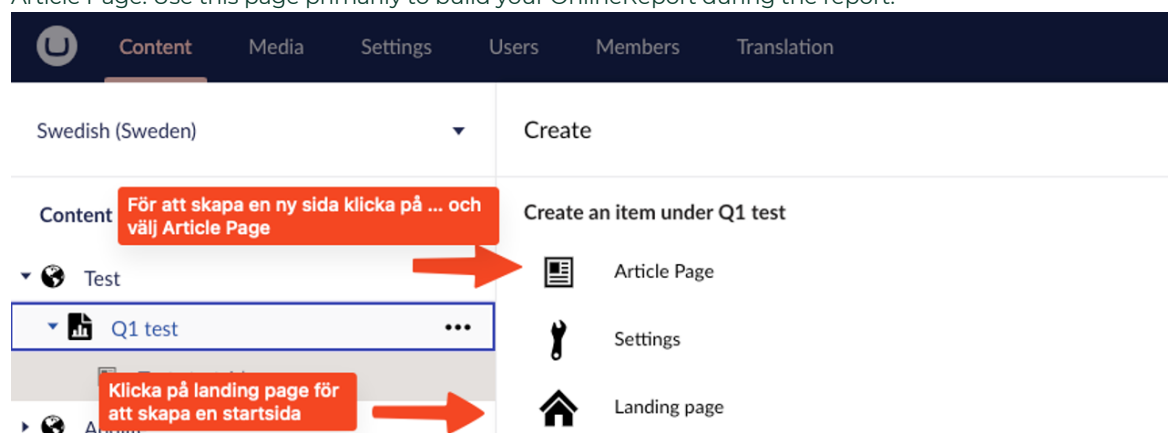
- Dynamic graph: Post this page below the page where you want a dynamic graph. The graph must also be posted as a macro in the text field. There are different types of graphs to choose from, such as pie graphs, area graphs, bar graphs, line graphs, etc. (More detailed instructions are provided later in the document.)

- Note main page: First create a "Note main page" and then a "Note page" under the "Note main page" folder. Note that notes are not article pages.

- Board member: Post this page below the page where you present the board or management. A separate page is needed for each board member. For everything to work correctly, you need to link an image from the media library to the board member page.

1. Add content to the page Fill the page with content, such as text, images or tables. (See respective sections for more information.)

2. Save and Publish Page When you are happy with the changes, click "Save and Publish" to save and publish the page.

3. Preview the page Click "Preview" to see a preview of how the page will look on the website. Select the desired language version (Swedish or English) to open the page in a new tab. If this is the first time you are previewing, you may be required to log in again with the same login details as for Onlinereports.

Change page order

The pages in OnlineReports are sorted according to the system's standard. Usually the most recently created page ends up at the bottom of the tree structure. You can easily change the page order of the content pages by

using the sort function:

1. Right-click the parent page (main folder) that contains the pages you want to sort.

2. Select "Sort" in the menu that appears after right-clicking.

3. Drag and drop the pages into the desired order. You can also click on the "Name" or "Creation date" headings to sort the pages alphabetically or by creation date. If you click again on the column header, the pages will be sorted in reverse order.

4. Click "Save" to save the new changes to the page order.

Move a page

You can move pages between different parts of the page structure by using the move function.

1. Right-click the page in the page structure that you want to move.

2. Select "Move" from the options that appear after the right click.

3. Select the parent page (folder) where you want to place the page under.

4. Click "OK" to confirm the move of the page to the selected parent page.
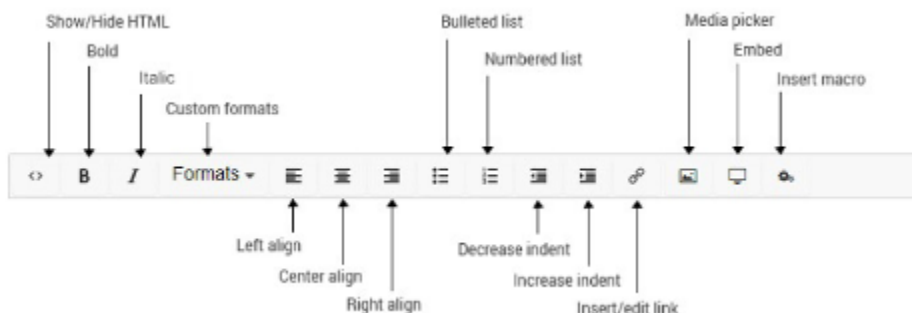
Edit content

Edit text on an existing page

To edit the content of an existing page in edit mode, follow these steps:
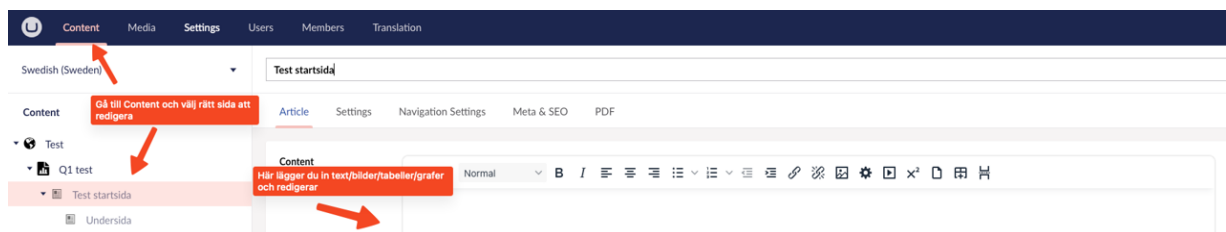
1. Navigate to "Content".

2. Click your way to the page you want to edit in the content panel's tree structure. Click on the page header to select it. If the page has subpages, click the small triangle arrow in front of the page header to display the subpages.

3. Make the desired changes in the page content field on the right. You can change text, add images, tables or other content.

4. When you are happy with the changes, click "Save and Replace" to save the changes.

5. Click "Preview" to see a preview of how the page will look on the website. Select the desired language version (Swedish or English) to open the page in a new tab. If this is the first time you are previewing, you may be required to log in again with the same login details as for Onlinereports.

Overview Editor buttons in Content


Restore content

By using the rollback feature, you can retain and restore previously saved and published content if needed. It gives you flexibility and the ability to revert to a previous version of the page if needed.

If you need to restore previous versions of pages, you can use the rollback function. Follow these steps:

1. Look for the info icon, usually in the shape of an "i" , and click it.
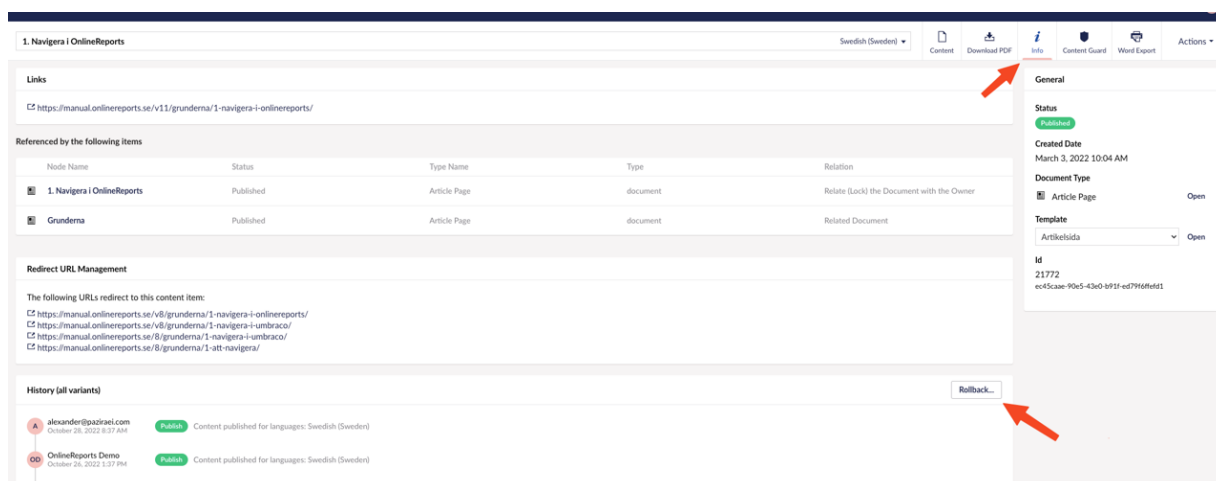
2. Click on "Rollback" in the middle of the page. The resulting box displays the previously saved and published versions of the page.

3. Compare the differences. Click on a previous version to compare its content with the current version. You can see the differences between the versions to judge which is the best fit.

4. After selecting the desired previous version, click "Rollback" in the lower right corner to restore the page to the selected version.
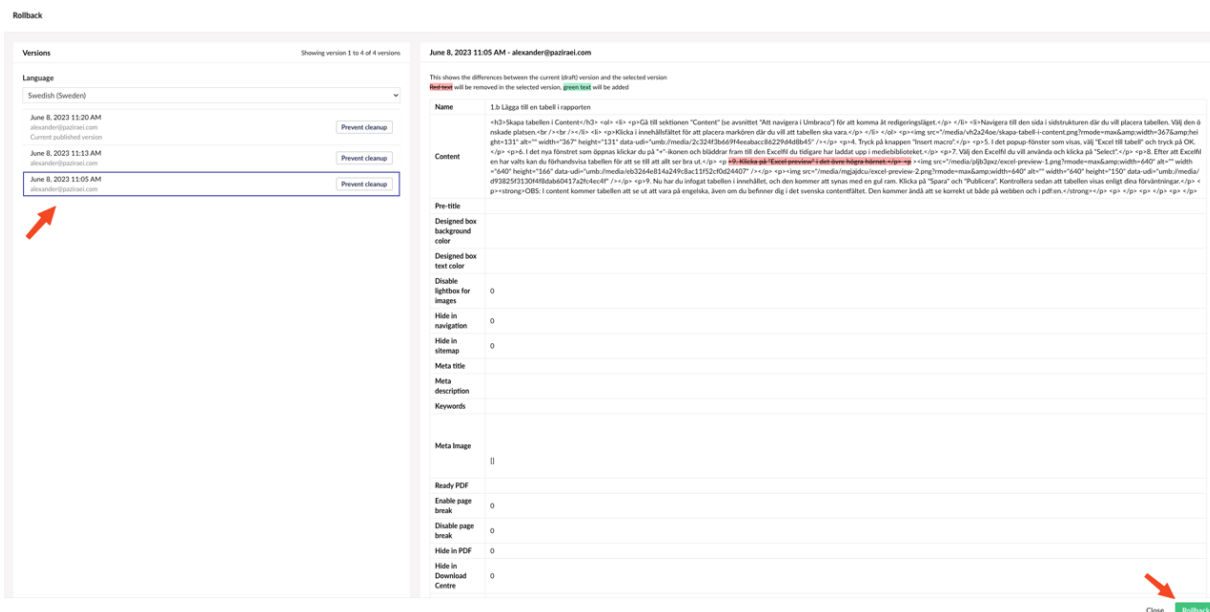
Tips

- **If pasted text** does not behave as expected, you can clear the formatting by first pasting the text into the text editor or using the "Paste Special" function in Word. Then paste the text into the content field and do the desired formatting directly in Umbraco.

- **Image captions** in the web annual report require you to add the text to the image using an image editing program. The auto-contiguous caption feature is not currently available. (Note that captions for clickable images in the right margin are available as a feature.)

Upload a file to the media library

The media library is an important part of the website and acts as a "hard drive" where you can upload all the files used, including images, excel files, movies and PDF documents. You can choose to upload files directly in the media library or when you are in the editing mode of the content and need to insert an image or other file.
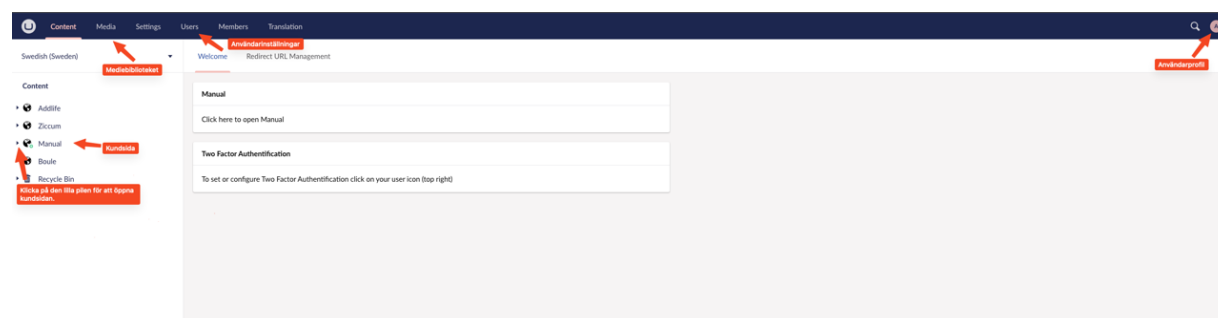
To upload a file to the media library, follow these steps:

1. First, navigate to the media library. You can find it by using the "Navigating Umbraco" section.

2. Scroll to and click on the folder where you want to place the file.

3. In the middle bar, select "Click to upload". You can then browse your computer to find the file you want to upload, and click "Open". Alternatively, you can drag and drop the file from your computer to the media library.

4. Click "Save" to complete the file upload.

Now the file has been uploaded to the media library in Umbraco and is ready to be used. You can then use the file in your content by following the sections on images and tables to learn how to add them from the media library directly to Content.
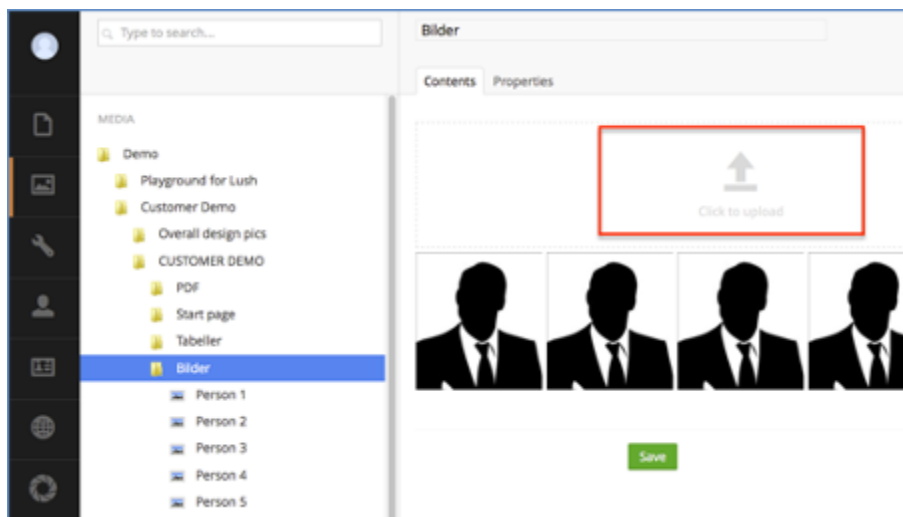
Change page order

The pages in Umbraco are sorted according to a predefined sort order in the page structure. Usually the most recently created page ends up at the bottom of the tree structure. You can easily change the page order in a part of the website by using the sort function.

To change the order of pages in Umbraco, follow these steps:

1. Right-click the parent page (main folder) that contains the pages you want to sort.

2. Select "Sort" from the options that appear after right-clicking.

3. Drag and drop the pages in the order you want them. You can also click on the "Name" or "Creation date" headings to sort the pages alphabetically or by creation date. If you click again on the column header, the pages will be sorted in reverse order.

4. Click "Save" to save the new changes to the page order.

By following these steps, you can easily change the order of the pages in Umbraco and adapt the structure of

the site to your needs. It allows you to organize and display your pages in the desired order, which can improve the user experience and navigation of the website.

Move a page

By using the move function, you can easily organize your pages and place them in the right place in the page structure.

To move a page to another part of the page structure, follow these steps:

1. Right-click on the page that you want to move to another location in the page structure.

2. Select "Move" from the options that appear after the right click.

3. Select the parent page where you want to place the page under. This will be the new location of the page in the page structure.

4. Click "OK" to confirm the move of the page to the selected parent page.
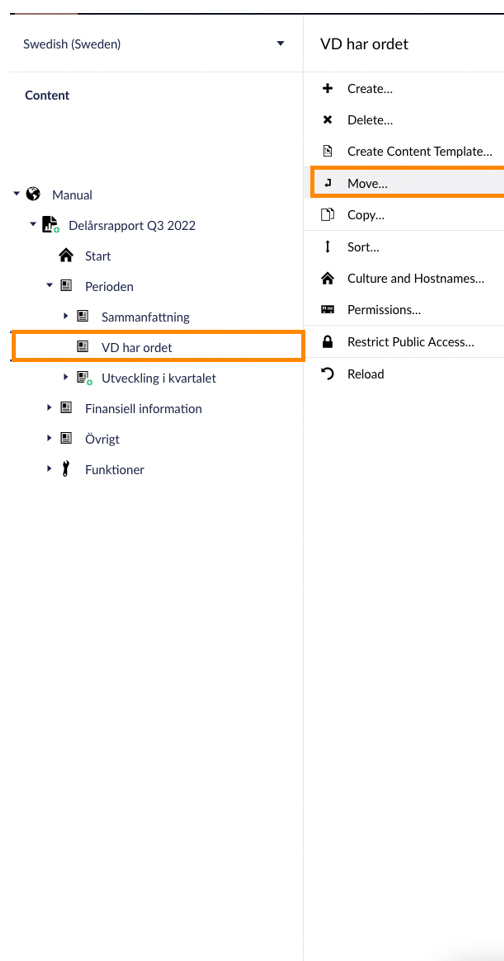
Manage images

When it comes to managing images in Umbraco, there are a few important points to note:

Image format:

For best results, the JPEG format is recommended for web, both on the web page and in automatically generated PDF documents. For high-resolution images that are reduced in resolution, the JPEG format can be used.

Image size:

It is important to adjust the image size before uploading an image. You should adjust the size in programs like Photoshop or similar to get a nice presentation. Avoid uploading images with too high a resolution. Reduce images using image reduction tools like Photoshop or freeware like TinyPNG before uploading.

Insert images into the report

You can insert images directly into the text field in Umbraco. Before adding an image, make sure it is already uploaded to the media library (see the "Media library" section).

1. Go to "Content" and navigate to the section where you want to insert an image.

2. Place the cursor where you want the image.

3. Click on the "Media Picker" icon.

4. Select the correct folder in the media library and click the upload button. Then select the image in the media library to insert it into the text.
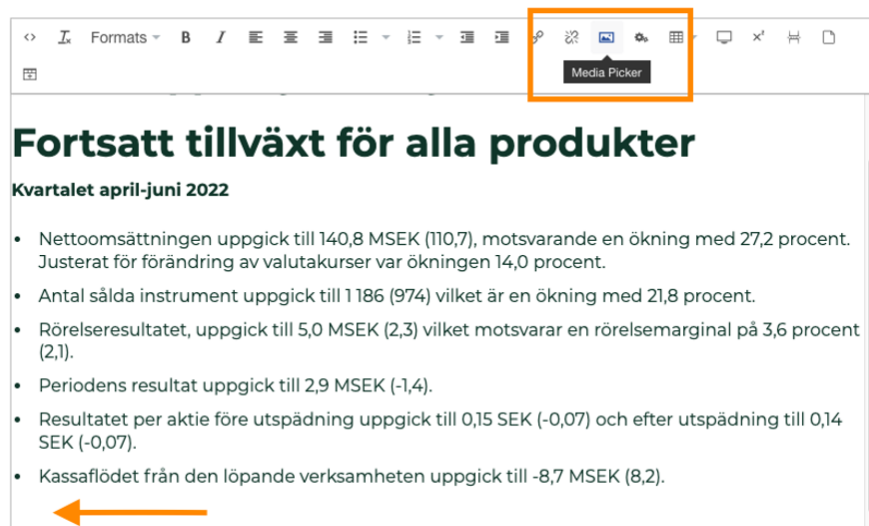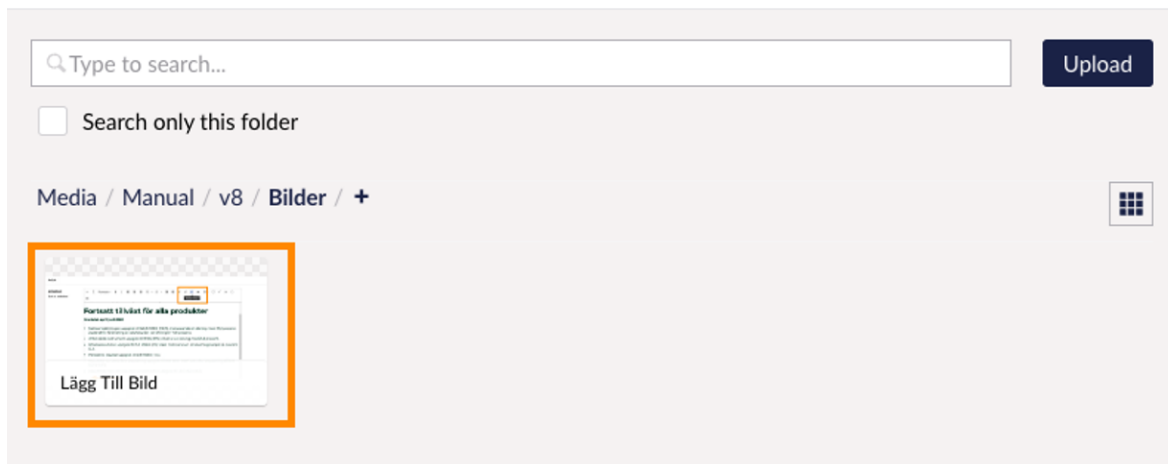

4. The box that appears shows the media library where you have already uploaded the image.
   Select the correct folder in the media library and click the upload button. Then select in the image in the media library to insert it into the text.
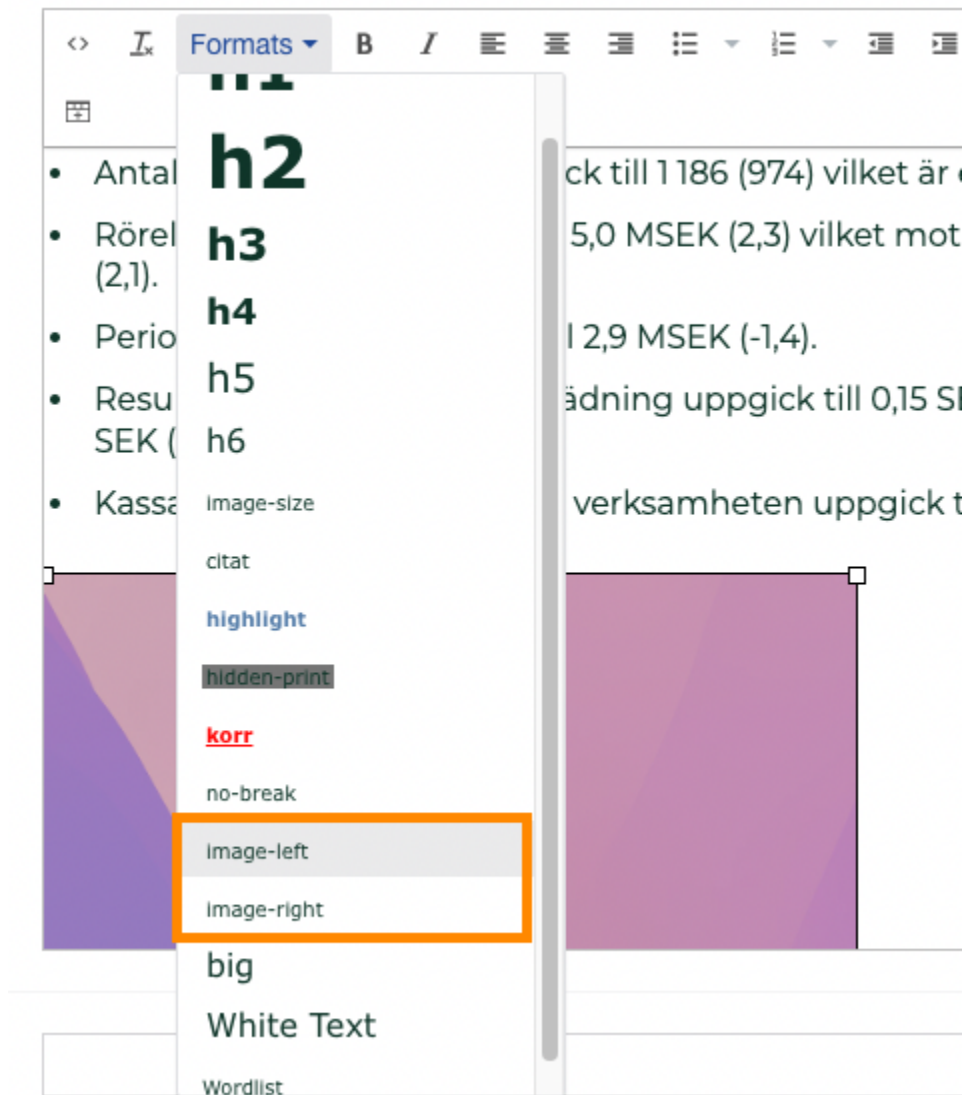
5. Click "Save and replace" to save the changes. The image will appear in the PDF document exactly as it is embedded in the text.

Image in right column

If you want to adjust the image to the right or left, select the image in content and select the appropriate **format** as "Image right" or "Image left". This can be used, for example, for CEO images.
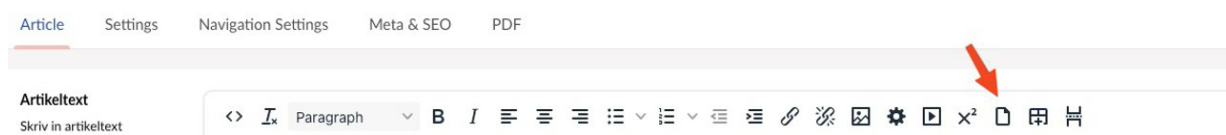
Use l in ghtbox

The lightbox feature allows you to click on the image to display it in a larger version on the screen. (You can test by clicking on the image below to see how it works).

By default the Lightbox feature is enabled, but you can turn it off by clicking "disable Lightbox for images".
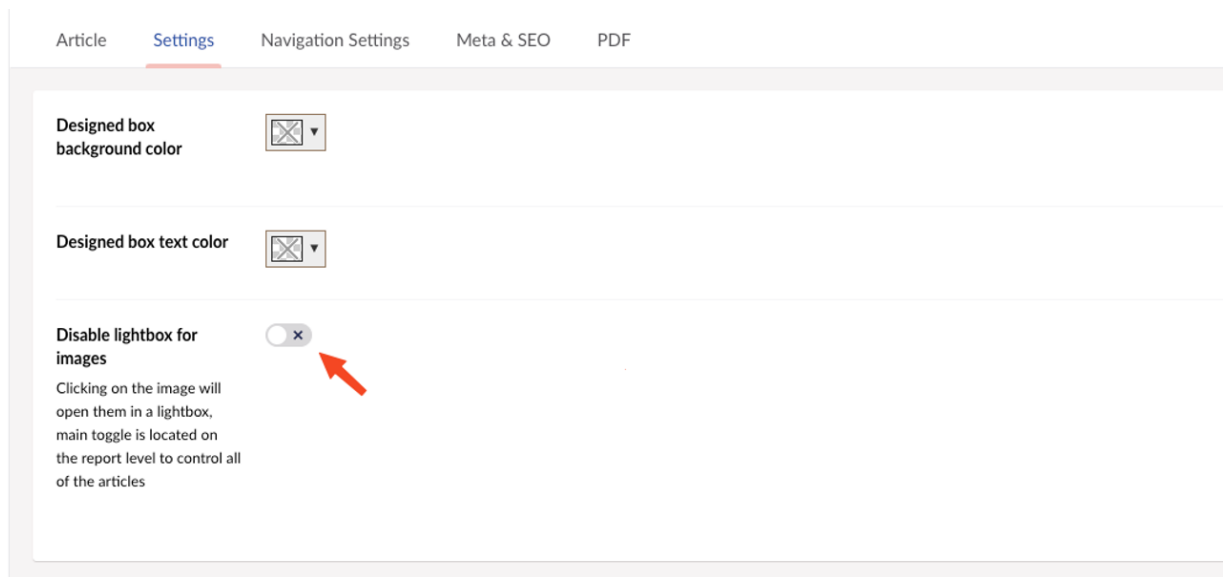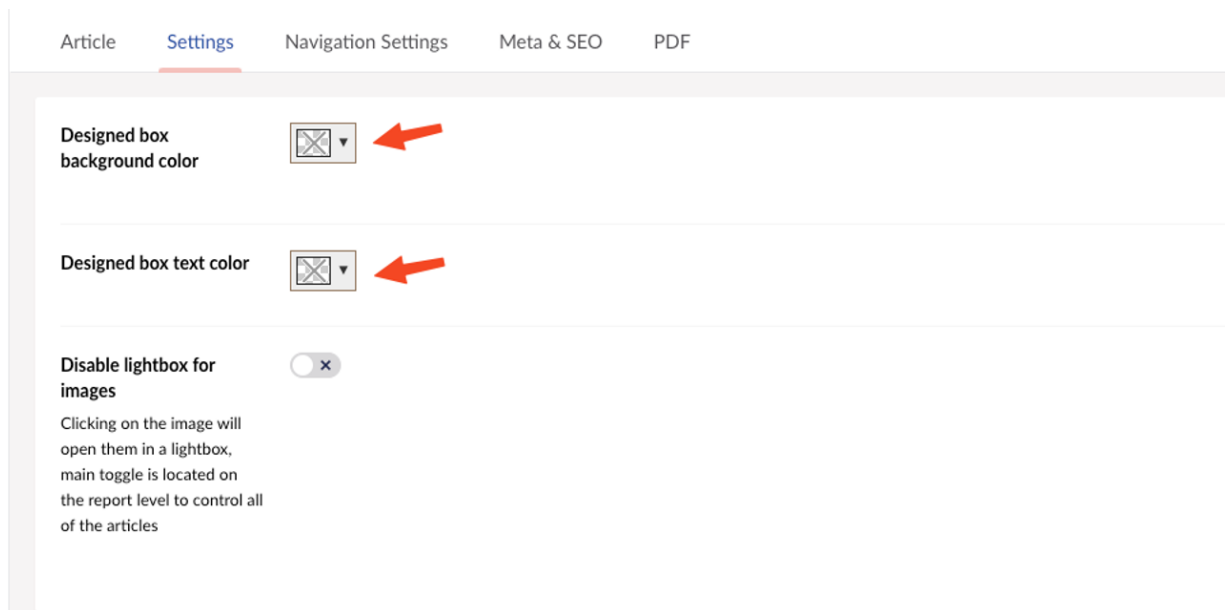
Use designed box

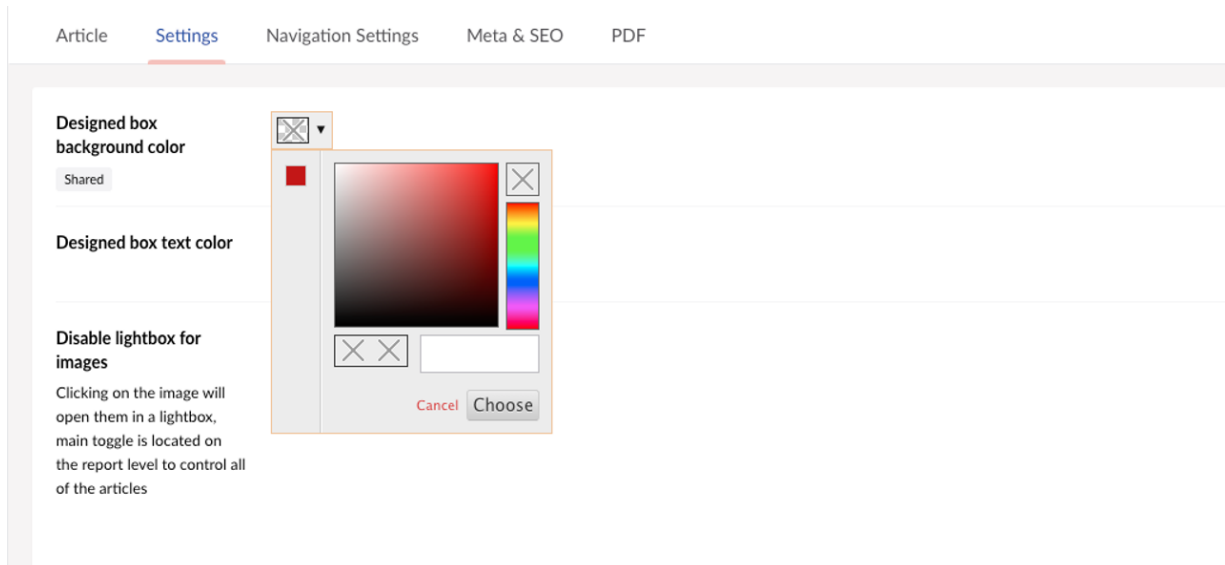To use the designed box feature, click the icon on the far right.

To change the color of the background or text in the box:

1. Go to settings which you will find at the top.

2. Here you can choose the color for both text and background for the box.

3. Select the desired color for either the background or the text by clicking on the color palette or by entering a color code.

4. Once you have selected the desired color, save the settings. Now the background or text in the box will change according to your choice.

Creating notes

To create notes in OnlineReports, you first need to create a subpage for the notes.

1. Go to "Content"

2. Click your way to the page you want to edit in the content panel's tree structure. Click on the three dots next to the title and select **"Note Main Page"** .

3. Give this page a name and save.

4. Tap the three dots next to the title. Then select **"Note page"** .

5. Fill in the desired information for note 1 and save. Create a new note page for each note.

6. When you are satisfied, click **Save and Publish** to commit the changes.

Preview the sheet music page by clicking on the main page and then **"Save and Preview"** . If you press one of the notes instead, only a blank page appears. If this is your first time previewing, you may now need to log in again. You do this with the same login as for Umbraco.