

# Project Settings

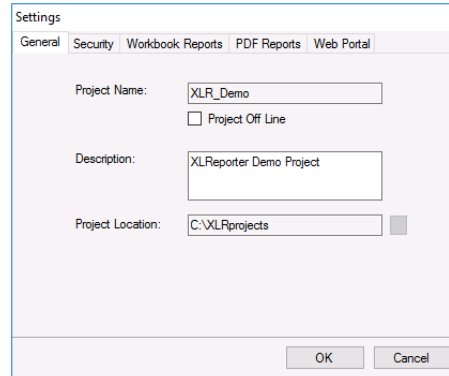
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## Overview

**Project Settings** such as folder names or web page access settings are accessed from the **Project** tab of the **Project Explorer** menu ribbon.

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## General



The screenshot shows the 'Settings' dialog box with the 'General' tab selected. The 'Project Name' field is set to 'XLR\_Demo'. There is an unchecked checkbox for 'Project Off Line'. The 'Description' field contains 'XLReporter Demo Project'. The 'Project Location' field is set to 'C:\XLRprojects'. At the bottom, there are 'OK' and 'Cancel' buttons.

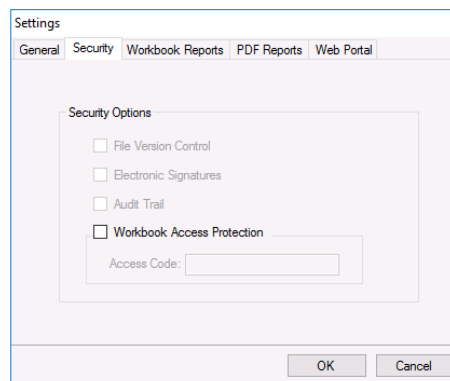
These settings show what was configured when the project was created. The project **Description** is editable.

To use a project off-site, i.e., without access to the physical data sources, check **Project Off-Line**. When a project is offline, two changes become apparent:

- **Browsing for items, such as tag names**  
Instead of a “live” list from the connector, the items from the connector **Catalogs** are shown.
- **Data Collection**  
Instead of reading the “actual” value, a simulated value is provided.

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## Security

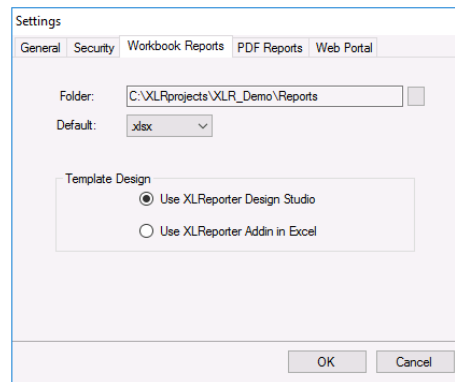


The screenshot shows the 'Settings' dialog box with the 'Security' tab selected. Under the 'Security Options' section, there are four unchecked checkboxes: 'File Version Control', 'Electronic Signatures', 'Audit Trail', and 'Workbook Access Protection'. Below these is an 'Access Code' field. At the bottom, there are 'OK' and 'Cancel' buttons.

These are the security settings available for the project. For more information, see the **Security** document.

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## Workbook Reports



These settings are for the **Folder** where reports in Workbook format are saved and the **Default** file extension of templates and workbook reports in the project. When selecting the **Folder**, if the last folder is not named **Reports**, a **Reports** folder is appended to the **Folder** path.

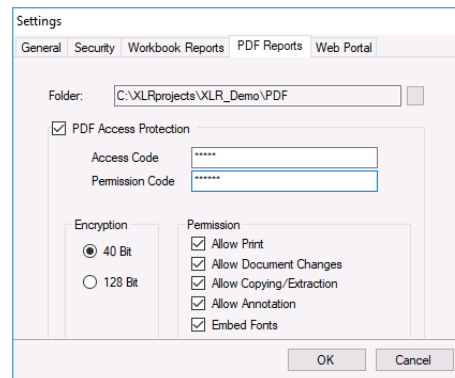
Under the **Template Design Studio** specify whether to *Design with Excel* or *Design with XLRReporter Studio*.

A Windows account with Administrator rights is required to change the **Template Design** setting.

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## PDF Reports

Specify the **Folder** where reports in PDF format are saved and, optionally, to enable PDF security. When selecting the **Folder**, if the last folder is not named **PDF**, a **PDF** folder is appended to the **Folder** path.



By default, PDF files are generated without **Access Protection**, meaning there are no restrictions on them beyond what is applied by the operating system.

With **PDF Access Protection** enabled, PDF files can be password-protected and/or accessible with limited **Permissions**. The **Permission** settings determine the features available when the document is opened in a PDF viewing application.

To assign **Permissions**, the **Access Code** and **Permissions Code** must either both be configured, or both must be unassigned. In the case that both are left blank, there will be no password prompt to open PDF reports, but the file permissions will be set as configured. If both codes are configured, the **Permission Code** will open the PDF with limited permissions, and the **Access Code** will open it with unrestricted permissions. In this case the two codes must be set to different values. If both codes are set to the same password the **Access code** permissions are set.

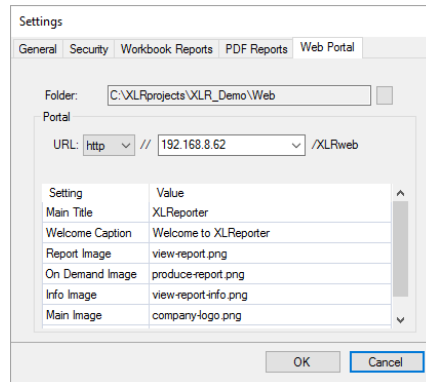
**Embed Fonts** is **always enabled** to include TrueType and Type1 (Postscript) fonts used in the document. This results in larger files but ensures portability across PDF viewers.

PDF reports are produced automatically using the *Save Workbook to PDF* and *Save Worksheet to PDF* actions from **Scheduler** or the **Save** option in **On Demand Reports** and **PDF Report Viewer**.

Any changes to the PDF security apply to any PDF reports created after the changes are made.

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## Web Portal



Specify the **Folder** where reports in Web (HTML) format are saved. When selecting the **Folder**, if the last folder is not named **Web**, a **Web** folder is appended to the **Folder** path.

If this is a **Distributed** edition, if the **Folder** is changed, you are prompted for administrator rights to update the web portal. If you cannot provide these rights, the change to the **Folder** is reverted.

For the **Distributed** edition, the **Setting** section provides configurable settings for the web portal. This section is disabled for the **Local** edition.

**URL** displays the entire URL to navigate to with a web browser to access the Web Portal. The *http* or *https* protocol can be specified here. If the system has more than 1 IP address, this setting can be changed to the IP address which allows for connection. If the portal is running under a specific port, the port number can be specified as *IPAddress:PortNumber*, e.g., *192.168.8.86:81* for port *81*.

### Customization

The other settings available are to customize the look and feel of the web portal. For more information, see the **REPORT, Setup the Web Portal** document.

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