

# CAST Report Generator - Templates and output options

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**Summary:** this page describes how to work with the templates provided with CAST Report Generator and custom templates that may be created for your own purposes.

## Introduction

Report Generator is supplied with a set of **pre-defined templates** which can be used as-is or adapted to your own needs. These templates are located here by default:

```
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\Application\Compliance reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\Application\Component library
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\Application\Legacy reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\Application\Sizing reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\Portfolio
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh_CN\Application\Compliance reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh_CN\Application\Component library
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh_CN\Application\Legacy reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh_CN\Application\Sizing reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh_CN\Portfolio
```

Templates are taken from "%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh\_CN\..." when Chinese (Simplified, PRC) is selected in Settings > Language.

You can find a list of these templates in the **Component documentation** which is accessible from each [Release Notes](#) page.



Note that:

- Some Application level templates provided in %PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh\_CN have been translated into Chinese.
- Portfolio level templates provided in %PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh\_CN\Portfolio have NOT been translated into Chinese and are instead provided in English.

## Officially supported templates

CAST provides various templates that are **officially supported**. These templates include scores, transaction risks, propagated risks, trending, scan-by-scan comparisons, lists of critical violations, and lists of components that have the most impact if remediated. Officially supported templates are stored in :

```
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\
```

Note that templates located in the following locations are not officially supported:

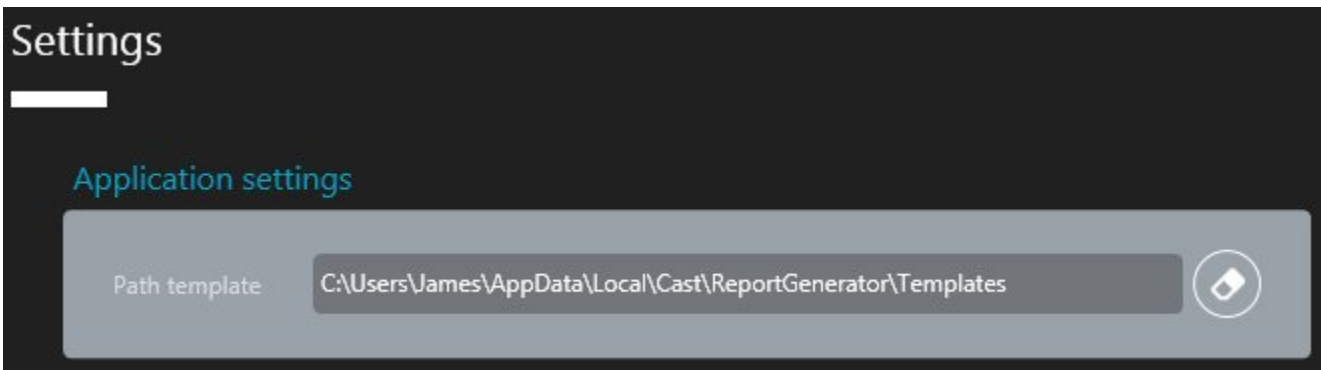
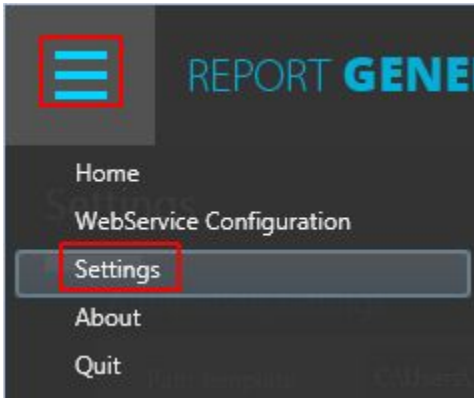
```
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\Application\Legacy reports
%PROGRAMDATA%\CAST\ReportGenerator\<>version>\Templates\zh_CN\Application\Legacy reports
```

## Sample reports

There are a number of reports that have been generated with these templates. To see samples of some of these reports, please click [CAST Report Generator - Sample Reports](#).

## Changing the template storage location

You can change the location that CAST Report Generator uses to store templates by modifying the **Settings** option and then clicking **Save** at the bottom of the page:



You must then ensure that you store the templates in a folder hierarchy starting with **Application** or **Portfolio** - if not, the Report Generator will not be able to find the custom templates. For example, if the new template storage location is set to:

```
D:\CAST\Templates
```

Then you should ensure that you create a folder hierarchy starting with **Application** or **Portfolio**. Templates can then be stored in any subsequent folder/subfolder, for example:

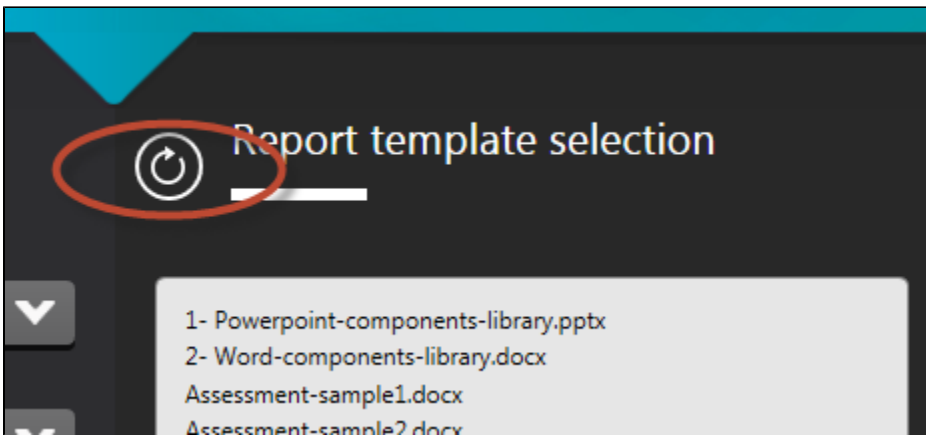
```
D:\CAST\Templates\Application\My Compliance Templates  
D:\CAST\Templates\Portfolio\My Other templates  
D:\CAST\Templates\zh_CN\Application  
D:\CAST\Templates\zh_CN\Portfolio
```

## Creating your own custom templates

It is relatively easy to create your own custom templates for generating bespoke reports: CAST provides "base" templates that provide an explanation of how to do so (for Microsoft Word, Excel and PowerPoint) and also contain a large set of **placeholders** (example data that can be extracted in text, graph and table format) that can be copied and then adapted as necessary. The "base" templates are stored in:

```
%PROGRAMDATA%\CAST\ReportGenerator\<version>\Templates\Application\Component library  
%PROGRAMDATA%\CAST\ReportGenerator\<version>\Templates\zh_CN\Application\Component library
```

You can use these base templates as the basis for creating your own report templates - simply copy them, make your changes and then save them with a different name. Refresh the Report template section to view the new template:



You must ensure that any custom templates are stored in the following locations (assuming that you are using the default storage location) so that they can be found by Report Generator:

Any default or custom folder/subfolder of:

```
%PROGRAMDATA%\CAST\ReportGenerator\

```

## Using the Excel output options

The CAST Report Generator supports the generation of reports in Excel format, as explained below. A template called "3 - Excel-components-library.xlsx" is also available as standard for Application reports.

### Reuse of Word and PowerPoint blocks

- All table and text blocks can be re-used in Excel.
- To use any block in Excel, prefix all definitions with RepGen:TEXT or RepGen:TABLE.
- The data will be put on the exact location where the definition resides.

### Limitations

#### Text blocks

- Cells referencing a text block will have their content replaced with the actual value received from the REST APIs.
- Style and format information will be preserved. Report Generator will try and generate numeric-type values when the data provided by the REST API is numeric; otherwise, the data will be inserted as text.
- Formulas referencing "text block" cells will work as expected.

#### Table blocks

- Report Generator inserts new lines starting from the line that contains the "RepGen:TABLE;BLOCK\_NAME;options..." definition. Existing content below the "RepGen:" will not be overwritten.
- Report Generator will not apply any style or format to inserted cells. However, Report Generator will try and generate numeric-type values when the data provided by the REST API is numeric; otherwise, the data will be inserted as text.
- Formulas referencing cells that are part of the block template will not be updated.
- As a result, it is recommended to reserve one worksheet per table block and insert formulas in one or more consolidation worksheets. Formulas referencing template cells should reference whole columns (e.g.: =SUM('raw\_data\_worksheet'!D:D)), or cell ranges that are large enough to address all data extracted from the REST APIs (e.g.: =SUM('raw\_data\_worksheet'!D2:D20000)).

#### Graph blocks

- Graph blocks are not supported in Excel: only table and text blocks.

### Block IFPUG\_FUNCTIONS

This block will display the Transaction Functions and the Data Functions as listed below:

- HEADER
  - NO: means there is no header displayed from the data from the REST API

- YES: means that the header will be taken into account as stored in the REST API
- TYPE
- TF = Transaction Function display
- DF = Data function display

Example:

Application Function Point - Transactional Functions						
Application Name:	RepGen:TEXT;APPLICATION_NAME	Application Size:	RepGen:TEXT;APPLICATION_RULE;ID=10151			
Snapshot date:	RepGen:TEXT;LAST_SNAPSHOT_DATE	Technical Debt:	RepGen:TEXT;METRIC_TECHNICAL_DEBT			
Element Type	Object Name	Value	Description	Object Type	Module	Technology
RepGen:TABLE;IFPUG_FUNCTIONS;HEADER=NO,TYPE=TF						

Result:

Application Function Point - Transactional Functions						
Application Name:	MAINFRAME	Application Size:	11977			
Snapshot date:	12/15/2015	Technical Debt:	802,070 \$			
Element Type	Object Name	Value	Description	Object Type	Module	Technology
Transaction	[C:\CASTMS\Deploy\MAIN	7	DET: 15, FTR: 5 (Outp JCL Procedure		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	7	DET: 21, FTR: 7 (Outp JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	7	DET: 12, FTR: 4 (Outp JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	7	DET: 9, FTR: 3 (Outpu JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	7	DET: 21, FTR: 7 (Outp JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	7	DET: 21, FTR: 7 (Outp JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	5	DET: 6, FTR: 2 (Outpu CICS Transaction		MAINFRAME full content	CICS
Transaction	[C:\CASTMS\Deploy\MAIN	5	DET: 6, FTR: 2 (Outpu JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	5	DET: 6, FTR: 2 (Outpu JCL Job		MAINFRAME full content	JCL
Transaction	[C:\CASTMS\Deploy\MAIN	4	DET: 6, FTR: 1 (Outpu CICS Transaction		MAINFRAME full content	CICS
Transaction	[C:\CASTMS\Deploy\MAIN	4	DET: 6, FTR: 1 (Outpu CICS Transaction		MAINFRAME full content	CICS
Transaction	[C:\CASTMS\Deploy\MAIN	4	DET: 5, FTR: 1 (Outpu CICS Transaction		MAINFRAME full content	CICS
Transaction	[C:\CASTMS\Deploy\MAIN	4	DET: 9, FTR: 1 (Outpu CICS Transaction		MAINFRAME full content	CICS