# Importing your custom reports into the new Printing gallery

Please follow this short guide if you wish to import any of your old/custom reports into your latest software update.

New for the software is the gallery view, allowing you quick access to a thumbnail gallery of all your report styles. From here you can print your reports, add them to favourites or create report packs/bundles.
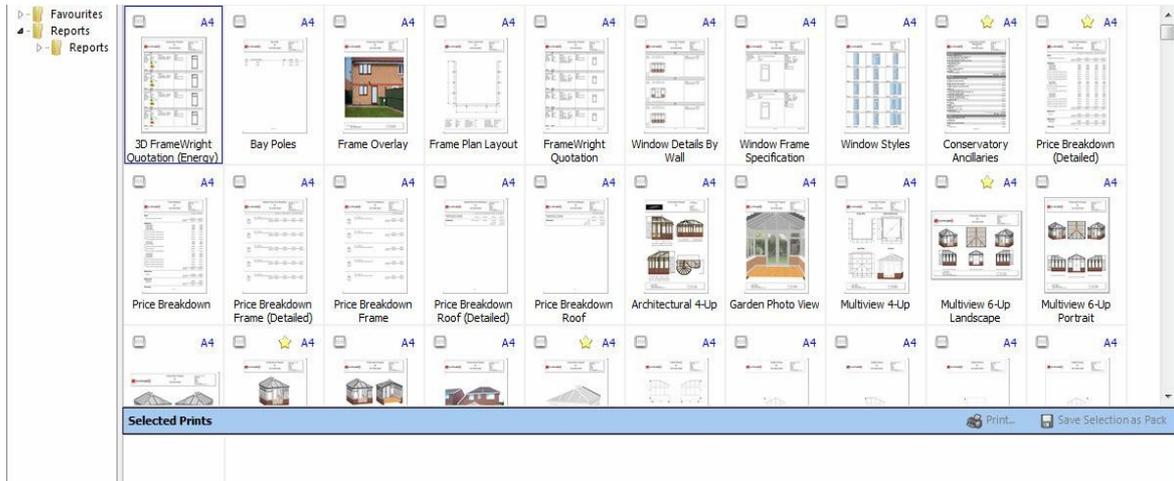

New report templates have also been created, which have simple to edit header/footer sections, so that you can customise reports to your needs - simply drag the datafields that you wish to display from the right-hand pane into one of the columns on the header/footer template as below
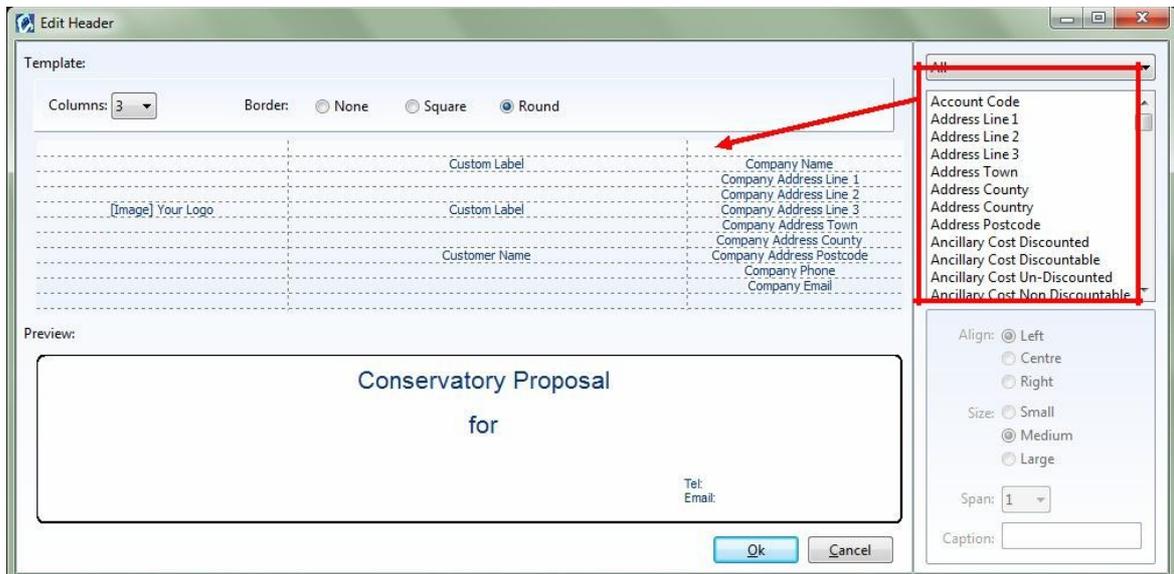
If you have previously customised any existing reports, created reports of your own, or wish to use any of the old type reports, you will be required to import these into the software installation and generate a thumbnail image for the gallery - this is a very simple process and is explained below:

Regular setup - If your reports are stored in the default folder (...\Reports)

Right Click the shortcut icon on your desktop, then click 'Open File Location' from the context menu
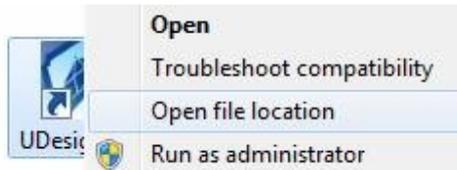

A file explorer window will now be displayed, showing the location to which the software is installed. Go back one level, by clicking the folder before 'Version Live' in the file explorers address bar - Typically this folder will be labelled 'RoofWright' or 'UDesign' as shown highlighted in red below.
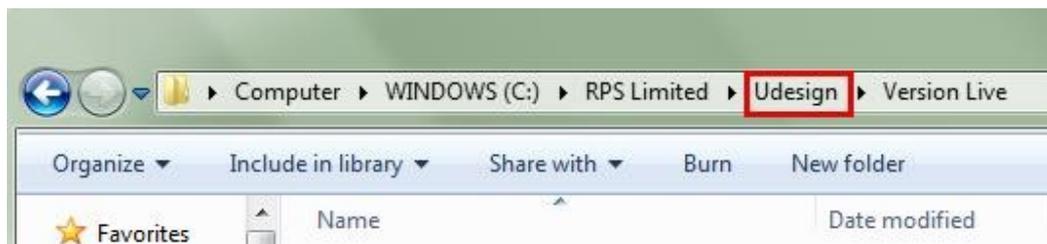
Once you are in this folder, you should see a folder called 'Backup Folder' - click into this folder and you will now see a folder called 'Reports' - Click into this folder and navigate to the report you wish to copy. These will either be an RTM, PDR or PDT file.
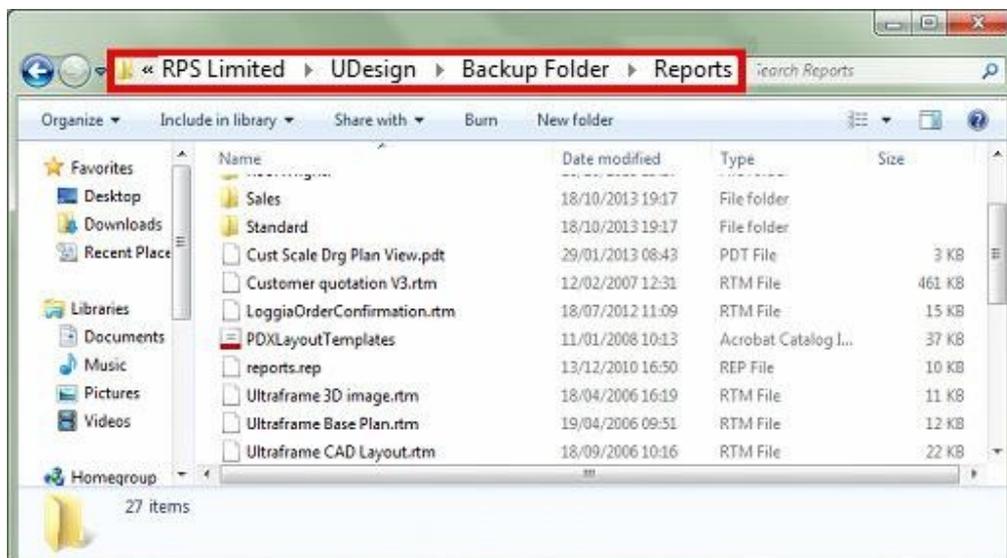
Copy the desired reports from the **Backup Folder> Reports** folder, into a suitable folder in the **Reports** folder. The below example demonstrates copying the the **Customer quotation V3.rtm** report, so it makes sense to copy this into the **Pricing** Folder.
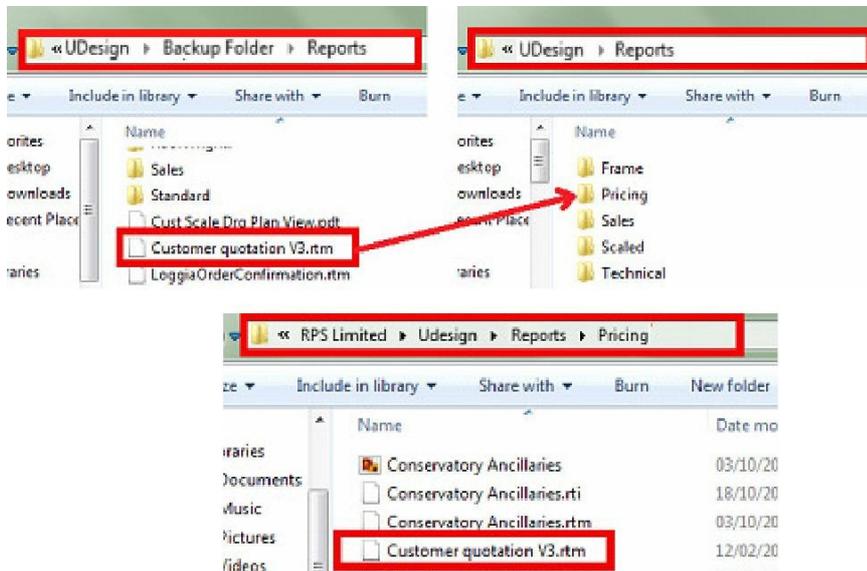

The report relocated in it's new folder

Next, the Thumbnail has to be generated - Run the software and open up any template, then click the **Printing** Tab. Browse through the gallery and you'll see that your newly imported reports don't have a thumbnail image (as shown on Customer quotation v3 below)
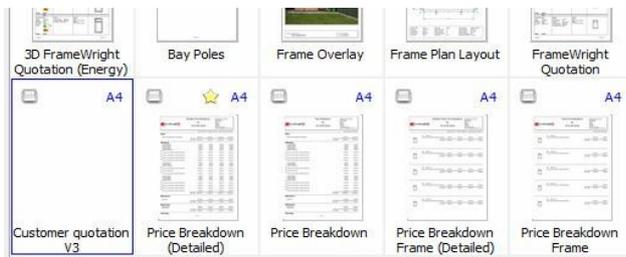
Right-click on this report, then select **Regenerate Thumbnail** - After a few seconds, your new thumbnail will become visible
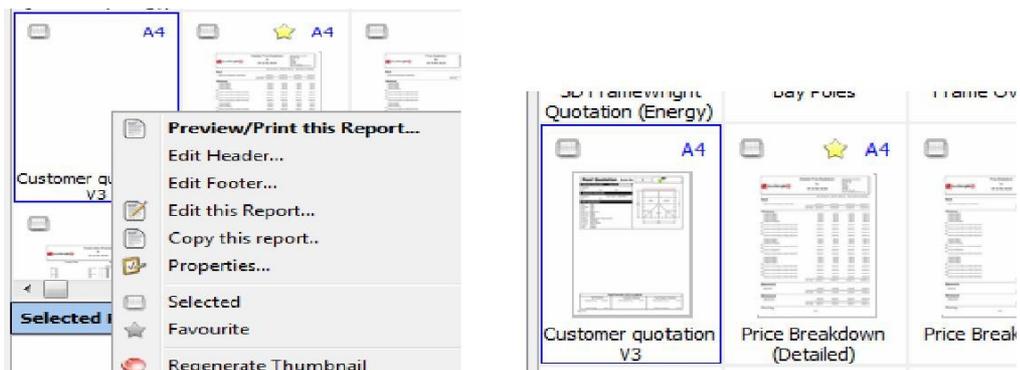
2. Reports located anywhere other than the default location

For example, if you have the software installed locally on your PC, but your report templates are stored on a server for everyone to access.

All your old reports will appear in the new gallery, but will require thumbnails generating - follow step 6 in section 1 above. Repeat for all of your reports.

All of the new reports will install within the reports folder of your software installation. If you wish to use some or all of the new reports, you will need to navigate to the reports folder - follow steps 1 and 2 in section 1 above above

The reports are grouped by type (Technical, Sales , Frame, Pricing etc) - find the report you want in either of the groups, then copy the corresponding .RTM, .RTI and .PNG files of the new reports into the folder that your reports are stored in.
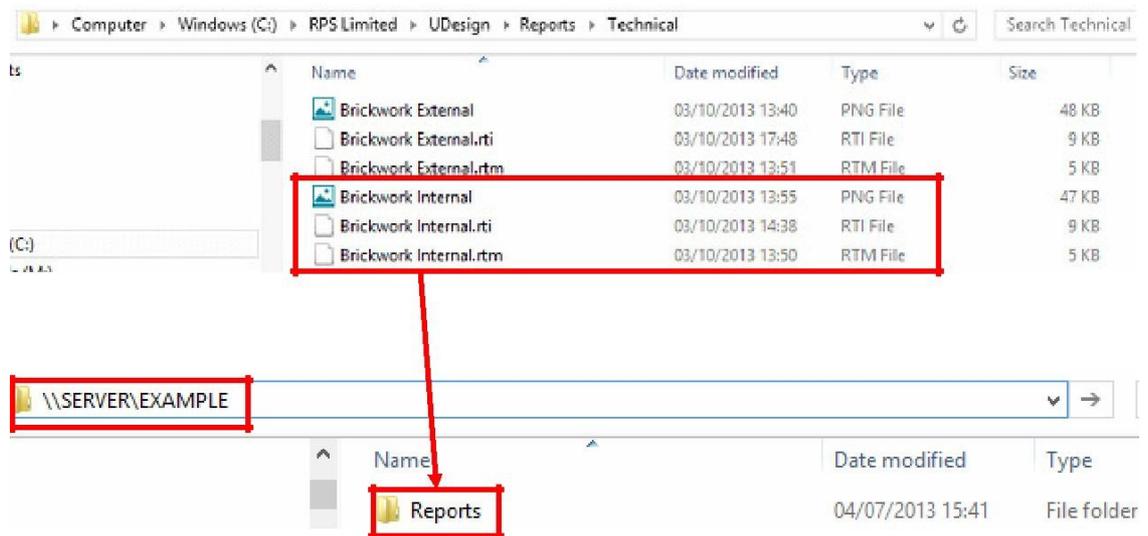
(If you are not sure of the current reports folder pathname, Click **Settings>System Preferences> General > Files** , the path of the reports folder is displayed in this window)

If you require any further assistance, please don't hesitate in contacting our Support Team on 0161 426 1120, Mon-Fri, 9AM-5PM