



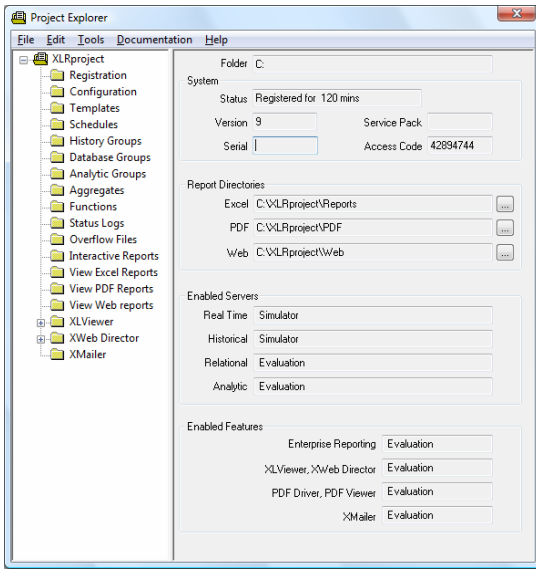
Designing a Report Solution

As part of designing any reporting solution, there are certain questions that need to be answered. Questions like “when are new reports going to be generated?”, “what will the reports be named?” and “where will the reports be stored?”.

XLReporter provides all the settings necessary to design a complete reporting solution.

Report Storage

In the right pane of the Project Explorer, the Report Directories of the project are shown. These directories define where generated reports are to be stored.



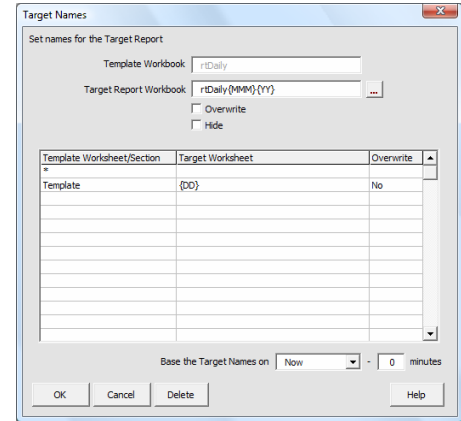
The Project Explorer

The Excel directory is where reports in Excel format will be saved. The PDF directory is where reports in PDF format will be saved. The Web directory is where reports in HTML format will be saved.

Each of these settings may be customized using the browse button provided.

Report Naming Convention

When designing a template in Excel, one of the key steps is specifying the target report naming convention. This is done in the Target Names dialog that is accessible from the **XLReporter** menu in Excel. The naming conventions of the workbook and possibly worksheets for the report are specified here.



Target Names

The Target Report Workbook setting is the name of the report workbook file that will be generated from the template.

If you would like a report workbook generated and named after the current month and year, you would also include **XLReporter** Name Types for the month and year in the setting, e.g., rtDaily{MMM}{YY}.

Beneath this is a list of all the worksheets in the template. Each sheet can have its own Target Worksheet configured or a single target sheet can be configured for the wildcard (*) that every sheet will adhere to. The specified Target Worksheet will be created from the Template Worksheet it is set for.

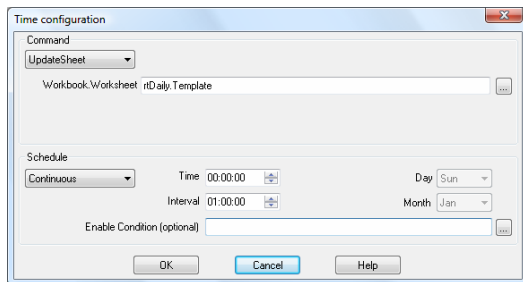
If within your monthly workbook, you would like daily report worksheets, set the Target Worksheet to the **XLReporter** Name Type for the current day, e.g., {DD}.

Generating Reports

Once a report template is designed, the next step is how to generate reports from that template. This can be done from **XLReporter's** Scheduler, an interactive report form or from a third-party application.

No matter where the report is generated from, commands must be issued in order this to happen. The basic command to generate a report is **UpdateSheet**.

The **UpdateSheet** command requires the Workbook and Worksheet to update. These should be specified as the template workbook and template worksheet you have designed.

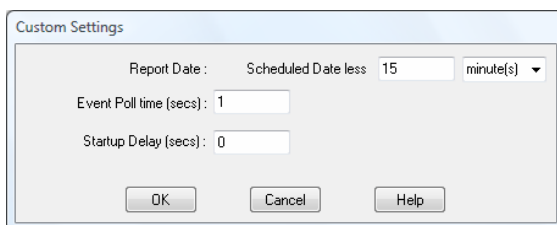


Configuring an UpdateSheet command

As part of the UpdateSheet command being performed, all the workbook and worksheet management specified in the Template (as part of Target Names) are applied. This means workbooks and worksheets are created as they are needed.

In some cases, it is necessary to schedule a report outside of the time period it represents, for example a daily report (midnight to midnight) scheduled to run at 12:05 in the morning.

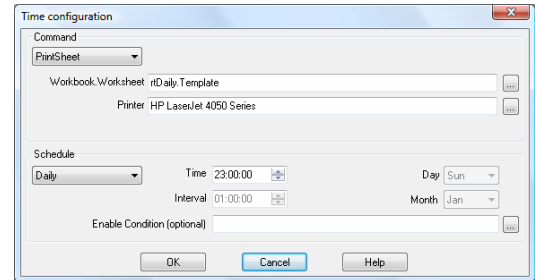
In such cases, an adjustment can be made so that the naming convention and data retrieval are correct. To adjust for the example illustrated, in the **Schedule Designer**, under **Scheduler**, **Customize**, the **Report Date** can be set to any value greater than 5 minutes.



Customizing Report Date offset

Publishing Reports

Once the report is completed, it can be published in many different ways. It can be sent to a printer, converted to a PDF file or published as a web page.



Configuring a PrintSheet command

If you wish to send the report to a printer or publish as a PDF file, you need to configure the **PrintSheet** command. Just like the **UpdateSheet**, this command requires the workbook and worksheet to print. And again, just like the **UpdateSheet**, this should be specified as the Template workbook and Template worksheet. The target report naming convention will be followed, publishing the latest report. The same holds true for web publishing.

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