



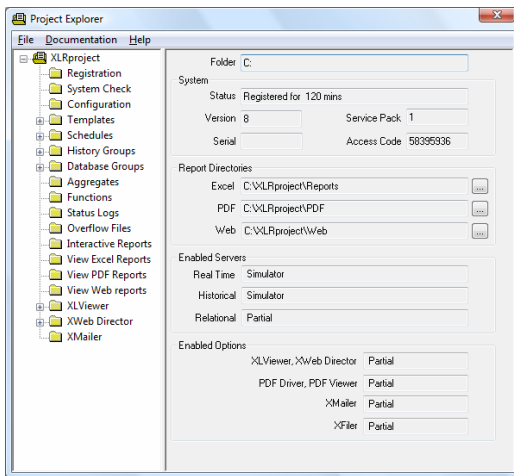
## Organizing Reports

As part of designing any reporting solution, you have to consider report organization. Questions that need to be considered are 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 organize your reports.

## 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.



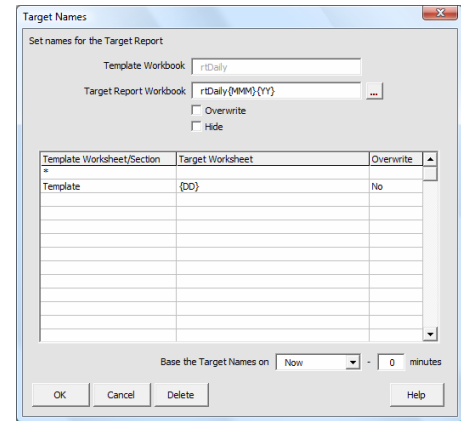
The Project Explorer

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}`.

At the bottom is the Base the Target Names on setting. This can be set to Now – a specified number of minutes or to Yesterday. This affects the naming convention you have specified.

When set to Yesterday, any **XLReporter** Name Types (like `{MMM}`, `{DD}`, `{YY}`, etc) will be based on the previous day whenever the report is executed.

A good example of this is a daily historical report. Since the report is based on history, the day must be completed before the report is generated. This means the report must wait until the next day. To adjust for that, you base the target names on yesterday so that yesterday's data get on yesterday's report even though we are a day ahead.

When set to a specific number of minutes the current date and time is subtracted by that number of minutes when the report is executed. Whatever that calculates to, that's the date and time that is used to determine the values of any **XLReporter** Name Types used.

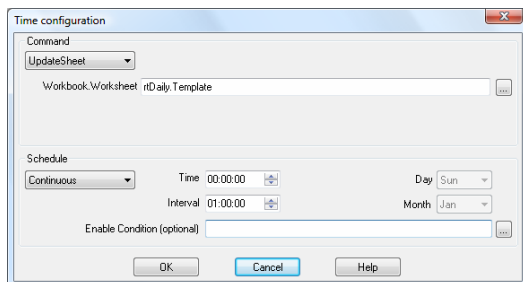
A good example of this is a daily report that runs from 8:00 to 8:00. All the data collected for the report from midnight to 7:59:59 needs to be written in the previous day's report. To ensure this, simply base the target names on Now - 480 minutes (8 hours).

## 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*

When the UpdateSheet command is executed, it first takes the workbook you specified and looks at the Target Report Name set. It then goes to the Excel directory of the project and sees if the target workbook exists. If it doesn't, it gets created at that time, based on the template.

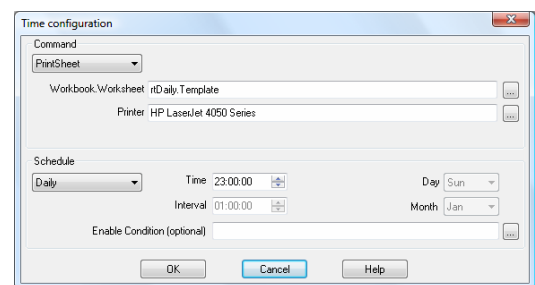
Next, it takes the worksheet you specified and looks at the Target Worksheet set. In the target workbook it looks for this sheet. If the sheet doesn't exist, it gets created in the target book.

Finally, the target worksheet in the target workbook is updated with the values for the report.

The beauty of this is anytime the report can be executed the workbook and worksheet required for the report are automatically created before data is attempted to be written to the report.

## 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.

---

SyTech, "The Report Company", develops software for reporting and database management systems.

Get your evaluation copy at [www.TheReportCompany.com](http://www.TheReportCompany.com) and solve your reporting problems *today!*

*All registered names are the property of their respective owners.*