

Chapter 5.

Spreadsheet Star!



Lock your layout ...

Into columns and rows. Layout Table reports send the data to Excel with shining success.

What's in this chapter ...

Here's a quick reference to the topics covered in this chapter.

Topic	Page
"Understanding Layout Table style reports"	95
"Creating a Layout Table report with the Quick Report Genie"	96
"Understanding the Layout Table Report Editor"	98
"Understanding the Cell Contents Dialog"	102
"Editing the Layout"	106
"Creating a Layout Table Report from scratch"	108
"Understanding Groups and Summaries"	108
"Sending "live" formulae to Excel"	111
"Creating Conditional Field Values with HTML editor"	115
"Creating Conditional Field Values with RTF editor"	119
"Creating Conditional Text"	122
"Separating Content with Boxes and Lines"	123
"Setting up the Report for Printing"	126
"Setting up the Report for Printing"	126

Special notes

LAYOUT TABLE REPORTS ONLY

This chapter is exclusively for Layout Table reports, however it is based on earlier lessons. Unless you are quite familiar with the Quick Report Genie, please go to page 14 to complete those exercises.* An understanding of the Report Editor is also presumed.

Understanding Layout Table style reports

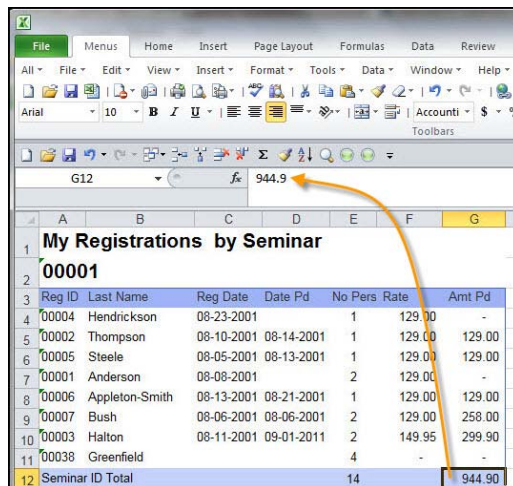
While they can be stand-alone reports, Layout Table reports are primarily used for:

- **Export to Excel:** The data appears correctly in separate cells for spreadsheet columns and rows.
- **Linked Reports:** Layout Table reports are used as a basis for Linked Reports. We will cover these in Chapter 6.

Layout Table reports use the same Report Editor as Free-form reports, although the data is presented differently because it is locked into cells, columns and rows for transfer to Excel.

Transferring data to Excel

Alpha Anywhere has four ways to transfer data to Excel.

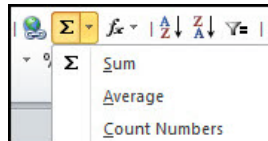


Reg ID	Last Name	Reg Date	Date Pd	No Pers	Rate	Amt Pd
00001						
00004	Hendrickson	08-23-2001		1	129.00	-
00002	Thompson	08-10-2001	08-14-2001	1	129.00	129.00
00005	Steele	08-05-2001	08-13-2001	1	129.00	129.00
00001	Anderson	08-08-2001		2	129.00	-
00006	Appleton-Smith	08-13-2001	08-21-2001	1	129.00	129.00
00007	Bush	08-06-2001	08-06-2001	2	129.00	258.00
00003	Halton	08-11-2001	09-01-2011	2	149.95	299.90
00038	Greenfield			4	-	-
Seminar ID Total				14		944.90

- **Browses (desktop)** can send data, but custom column titles do not transfer (only the field names are sent). No Groups or special formatting.
- **Export operation (desktop).** Tables are available, but not sets.
- **Quick Report Genie (desktop, web, mobile).** Custom column titles. Groups available. Pre-formatted styles can be applied. Summaries and calculated fields available.
- **Layout Table Report (desktop, web, mobile).** All the above plus additional formatting options.



In the first two cases, data is sent to Excel as simple values. Calculations, such as Sum, Average, etc., will need to be added at the Excel level.



Layout Table reports, however, can be set up so that the calculations are “live” in Excel (see page 111).

*. If you are coming from an earlier version, please note that there have been several changes made to the genie for Alpha Anywhere, so you may want to revisit it.

What to expect when transferring to Excel

In designing Quick Report and Layout Table reports for transfer to Excel, keep the following in mind.

DATES

Dates will be entered in Excel as formatted in Alpha Anywhere. Excel recognizes them as Date fields and, if you overtype, the formatting is maintained.

NUMERIC FIELDS

Numeric fields are sent to Excel as exact values (100 will have a cell value of 100).

SUMMARIES

Summary, such as totals will be transferred as *values* unless you specify at the Report Editor that you want them to be “live” calculations (see “Sending “live” formulae to Excel” on page 111).

CALCULATIONS

Same as Summaries above.

Creating a Layout Table report with the Quick Report Genie

COMPLETED REPORT

The completed reports for this section are *QuickLayoutTableNew* and *RegistrationsLT*.

While you can create a Layout Table from scratch, the Quick Report Genie is more efficient. We have a practice report ready for you that is similar to the report we created in “Understanding the Quick Report Genie” on page 14.

In this section, we will edit the Quick Report by adding a calculated field and making a couple more adjustments. Then we send the Quick Report to Excel. After taking a look at it there, we will open a copy in the Report Editor for further design.



1. *Control Panel* > *Reports* tab: Open **QuickLT_Practice**.

Saving the Quick Report under another name

As we noted earlier,* using Save As to save the report under another name will send the original report to the Report Editor, making the Quick Report genie no longer available. Since this is an important concept to understand, we will do it now so you can see the impact.

2. Click Save As... to save the Quick Report definition as **MyQuickLayoutTable**.
3. Go to Control Pane > Reports and right click > design on the original QuickLT_Practice report.
 - The Quick Report genie is gone and the report is shown at the Report Editor.

*. See “Saving the Quick Report Genie” on page 23.

4. Return to *MyQuickLayoutTable*.
 - This Quick Report definition will be available under this name as long as you do not save it as another!
5. Click the **Calculated Fields** tab.

Creating a Quick Report Calculated Field

As we explained when we first visited this tab, the builder is harder to identify here. Not to worry, Alpha Anywhere wouldn't leave you in the dark! As soon as you begin typing, aids appear.

If you have been developing web applications, you are probably familiar with its use. If you are a desktop user, this one starts out differently than the ones you are used to, although the Expression Builder will become available.

Defining calculated fields for the report is a two-step process:

- A. Create the calculated field.
- B. Add it to the report.

A. CREATE CALCULATED FIELD

A calculated field is one that doesn't exist in the table and is usually based on fields that are in the table. It is defined using Xbasic functions. We will create a numeric calculation, but it could just as easily be character, date or another field type. Here's what we're going for:

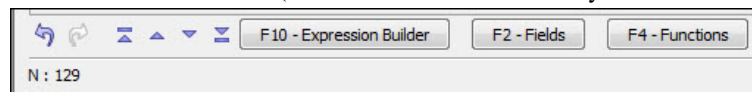
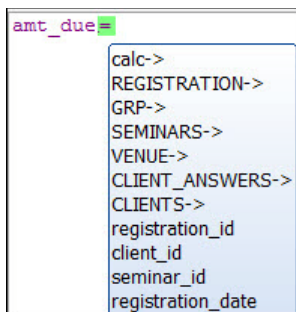
amt_due=no_persons * rate

Here's how it's entered:

a. Type the following: **amt_due=**

- After you type the = sign, a pick list of tables and fields appears as at left.

- Also note that Expression Builder, Fields and Functions buttons appear at the bottom of the window. (Maximize the window if they are out of view.)



- You can continue to write the expression here or you can go to the Expression Builder. We'll stay here this time.

b. Choose the fields to complete the expression: **no_persons * rate**

B. ADD CALCULATED FIELD TO REPORT

Now that the calculated field has been created, it must be added to the report in the same manner as any other field – at the Columns tab.

6. Click the **Columns** tab.
7. **Scroll** to the very bottom of the *Available Fields* list.
8. Place **Calc -> amt_due** at the bottom of *Selected Fields*.
9. Format as follows:

PROPERTIES: CALC -> AMT_DUE

COLUMN

- **Label:** Amt Due.
- **Width:** 16.

SUMMARIES

- Format: Choose 123,456.78 (blank if zero)
- Total: **Yes.**
- Just a couple more settings and we'll be ready to send the report to Excel.

Reg ID	Last Name	Reg Date	Date Pd	No Pers	Rate	Amt Pd	Amt Due
00004	Hendrickson	8/23/2001	1/0/1900	1	129.00	0.00	129.00
00002	Thompson	8/10/2001	8/14/2001	1	129.00	129.00	129.00
00005	Steele	8/5/2001	8/13/2001	1	129.00	129.00	129.00
00001	Anderson	8/8/2001	1/0/1900	2	129.00	0.00	258.00
00006	Appleton-Smith	8/13/2001	8/21/2001	1	129.00	129.00	129.00
00007	Bush	8/6/2001	8/6/2001	2	129.00	258.00	258.00
00003	Halton	8/11/2001	9/1/2011	2	149.95	299.90	299.90
Seminar Id Total				10		944.90	1,331.90

REPORT SETTINGS TAB

- Report: Use Layout Tables: **Yes.**
- Page: No date or page numbers.

STYLE TAB

- Choose **Section Borders > Blue.**

PREVIEW TAB

- Click **Save report to a file > Excel.**
- Filename: Accept the **default.**
- Open file with associated application? **Yes.**

The report opens in Excel.

The Style formatting is honored. As expected, the numbers transmit as their values.

- We will save this Quick Report and then create a copy for further editing in the Report Editor.
- 10. **Close** the Excel file and return to Alpha Anywhere.

Switching to the Layout Table Report Editor

Now that we are satisfied with the general report layout, we will go to the Report Editor where additional edits can be made. First, we will save the genie.

- Ctrl + S to **save** the Quick Report definition.
- Click **Open in Report Editor.**
- Select the report type: Choose **Layout Table report.**
- Click **Open a COPY of this report in the Report Editor.**
- Save as *Report Name: MyRegistrationsLT.* (Click OK)

Understanding the Layout Table Report Editor

- This report continues from the previous one. *MyRegistrationsLT* should be open at the Report Editor in design mode.

COMPLETED REPORT

The completed report for this section is *RegistrationsLT*.

We immediately notice that the Report Editor has the same basic format of the Free From editor – the sections are the same – but the fields and labels appear in bands, rather than as separate objects. This is because they are locked into cells, columns and rows so they will transfer properly to Excel.

There are two main tools that govern the behavior of cells, rows and columns, the Layout Table toolbar and the Right-click menu.

LAYOUT TABLE TOOLBAR



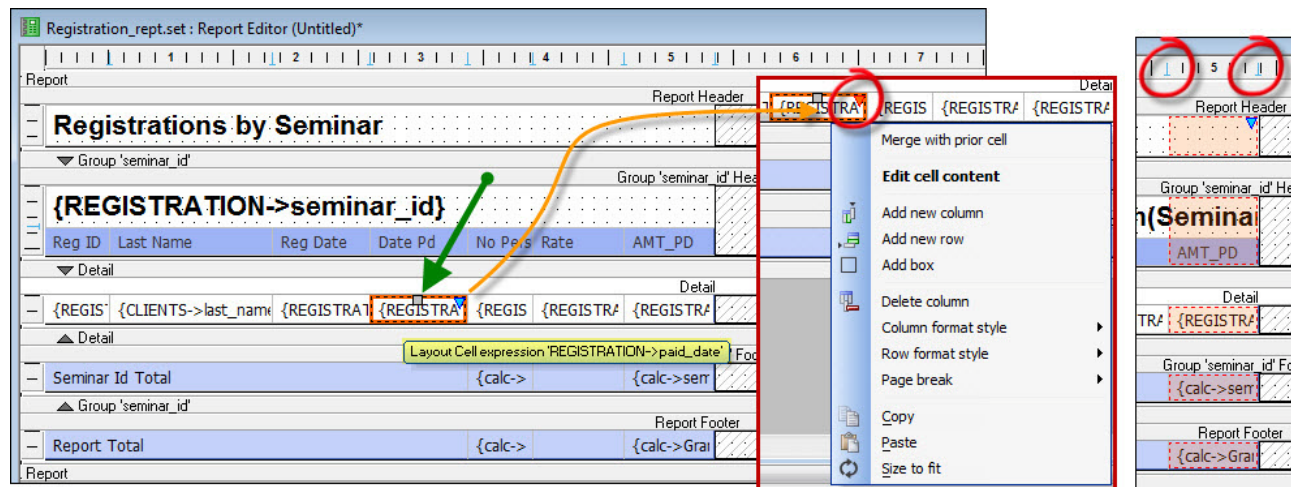
The Layout Table toolbar should be located to the right or below the main toolbar (fixed, not floating). If you don't see it, click the button next to Copy Appearance to toggle it on/off.

This toolbar governs the behavior of columns and rows.



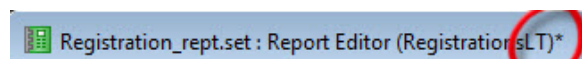
RIGHT CLICK MENU

This menu comes up when you right click on a cell or click the small arrow in the top right corner of the cell (circled in middle pane).



This section describes the features and explains how they work. We want you to be able to experiment, so we will close the report without saving before starting the actual lessons. First, we need to save the report.

- The report was created with the name we gave it (MyRegistrationsLT), but it still needs to be saved at the Report Editor. (Note the * indicating unsaved edits next to the name on the Title Bar.



1. **CTRL + S** to save as **MyRegistrationsLT**.
2. Feel free to play along as we explore cells, rows and columns.

Exploring cells

In this type of report, we will think in terms of cells, rather than objects.

- a. Click several different places in the bands.

- When a cell is selected, the surrounding edges turn red (arrow above). These are individual cells that can be edited.

b. Hover over the cell to see its full name (yellow above).

EDITING CELLS

Editing is done in the *Cell Contents* dialog that we will discuss shortly. There are three ways to open it.

a. Select the cell and click the little blue down arrow in the right corner.

- The blue arrow turns red when the cursor touches it as seen in the center pane above (circled).

b. Click on the arrow and choose **Edit cell content**.

or

- Right click on the cell to open the menu; choose **Edit cell content**

or

- Double click on the cell.

COPY/PASTE CELLS

To copy the contents of one cell into another:

- Select a cell: Right click > Copy.
- Select the 2nd cell: Right click > Paste.

MERGE CELLS

Row cells can be combined into a single cell.

- Merge with prior cell: Select the cell, right click > Merge with prior cell.
- Merge selected cells: CLICK + SHIFT CLICK a range of cells to select. Click the *Merge selected cells* button on the Layout Table toolbar.
- Split Merged Cells: Select cell with unwanted merging. Right click > Split merged cells or click the *Split Merged Cells* button on the toolbar.
- See “Merging cells” on page 107.

Exploring columns

The cells are locked into columns and rows, like a spreadsheet. The tab marks on the top ruler (circled in right pane above) define the borders of each column.

c. Click between the two tab marks to select the column (turns pink).

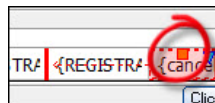
ADJUST COLUMN WIDTH

To make a column wider or narrower:

- d. Drag the tab mark on the top ruler (cursor turns to double sided arrow).

MOVE COLUMN

Columns positions can be changed.



e. Select the cell and click the small bar inside it.

f. Keep dragging until a red line appears. The line indicates the new position.

g. Release the mouse at new location.

ADD BLANK COLUMN

To add a new blank column,* use either the right click menu or the Layout Table Toolbar. Both place the column to the right of the selected one.

- Select a cell: Right click > *Add new column* or click the *Append new column after selected column* button on the Layout Table toolbar.

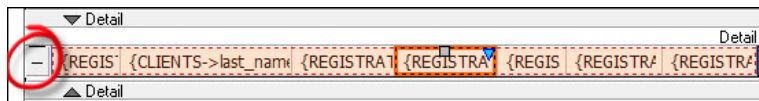
DELETE COLUMN

Delete follows the same process as above.

- Select a cell: Right click > *Delete column* or click *Remove selected column* button on the Layout Table toolbar.

Exploring rows

- Click on the side ruler to select the row. Lets you format all cells at once.



MOVE ROW

If you have **more than one row in a section**, the row positions can be swapped within the section.

- Must have minimum of two rows in the section.



- Group section:* Click on the cell next to the left ruler.

- The row will change color and a small red box will appear with bubble help that says *Click and drag to move the row*.

- Drag up or down to relocate the row.

ADD ROW

To add a new blank row, use either the right click menu or the Layout Table Toolbar. Both place the row below the selected one.

- Select a cell: Right click > *Add new row* or click *Append new row after selected row* button on the Layout Table toolbar.

REMOVE ROW

Delete follows the same process as above.

- Select a cell: Right click > *Delete row* or click *Remove selected row* button on Layout Table toolbar.

Additional features

BOXES

A box can be placed around a range of cells.

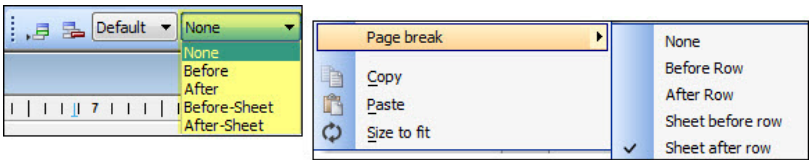
- Layout Table toolbar: Select a box and click *Create a box for cell selection*.
- Select a cell and right click > *Add box*.
- See “Separating Content with Boxes and Lines” on page 123.

PAGE BREAK

The Right click menu and Layout toolbar both offer Page Break options. They appear the same at Preview, but are different in Excel. Here’s how they work – feel free to experiment.

ADD Right click > *Page Break* or open the “None” menu on the toolbar (yellow).

*. To add a field column, see “Adding a field column” on page 106.



• *Before* or *After Row* creates a standard page break or an embedded page break in Excel.

• *Sheet before* or *after row* creates a new Excel sheet for each break.

REMOVE To remove a page break, choose *None* from one of the above menus.

TOOLBOX

Layout Tables do not have the toolbox like the one we saw for Free-form reports. This one contains only two options: *Linked Tables* and *Charts*.

FLOATING TOOLBARS

The *Text*, *Border* and *Copy Appearance* Toolbars are all active. The *Arrange* Toolbar is not.

• You can select an entire row or column and format all at once.

3. If you have made changes to *MyRegistrationsLT*, close it without saving.

Understanding the Cell Contents Dialog

COMPLETED REPORT

• The completed report for this section is *RegistrationsLT*.

All cells have the same editor. As expected, the options change according to the type – text, field, expression, etc. Cells can be changed from one type to another, unlike Free-form report objects. In other words, you can change a Static Text cell to a Field, Expression or Image. First, we will review the options and then we will put them to use.

This is another test exercise. Feel free to change anything you like because we won't be saving the edits.



1. Re-open the **MyRegistrationsLT** report in design mode.

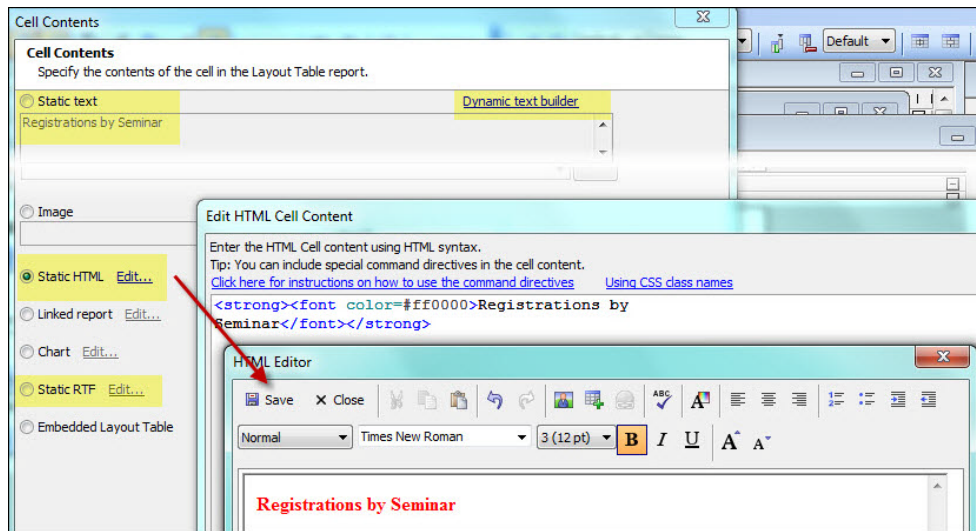
Editing and formatting text

There are three methods for editing and formatting text cells, Static Text, Static HTML and Static Rich Text. Don't be misled by the term "static." All of these editors permit conditional entries, too.

STATIC TEXT

Labels are created with "Static Text." It is simple text, much like the text objects for Free-form reports. All text has the same formatting that can be done at the Text toolbar or in the Properties Pane.

The actual wording is modified at the Cell Contents dialog.



2. **Report title:** Right click, select **Edit cell content** or double click on the cell.

Dialog: Cell Contents

- Static text is entered without quotes.

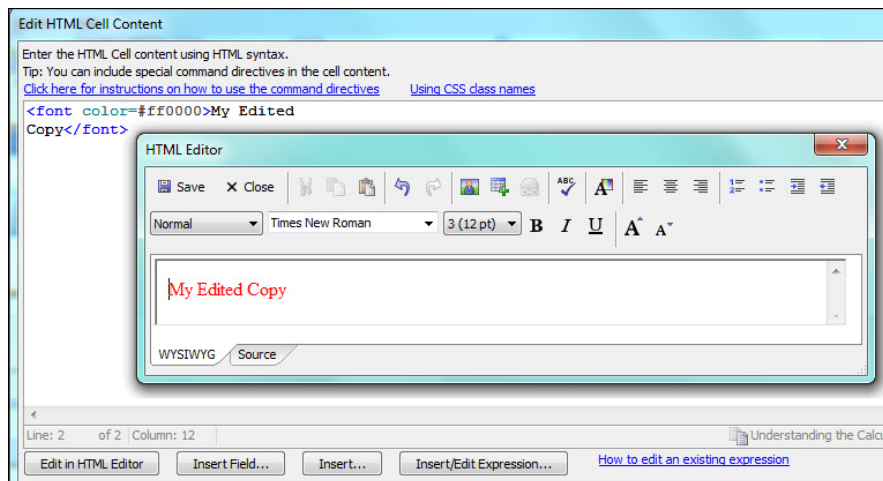
3. Click Dynamic Text Holder.

- This genie is for entering conditional text.

- See “Save and close the report.” on page 108.

STATIC HTML

This editor gives you the full power of the HTML Editor and permits insertion of images with the text. You can also use it to create conditional expressions.



4. Click **Static HTML** and then click Edit.

Dialog: Edit HTML Cell Content

You can write the HTML directly at this window or open the HTML Editor for a WYSIWYG view.

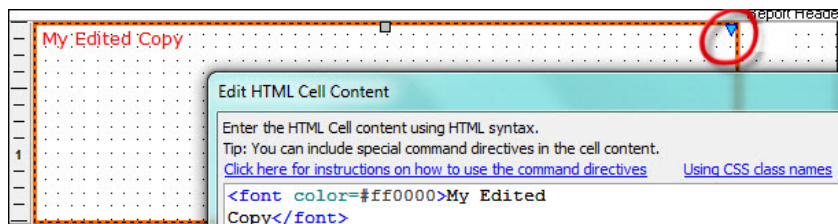
a. Click **Edit in HTML Editor**.

b. Enter and format some text as follows: **My Edited Copy**.

- Acts like a Rich Text editor in that individual words, letters, paragraphs can be formatted independently.

c. Click **Save** to see the results in the *Edit HTML Cell Content* window.

d. Click **OK**.



Now we'll see what happens when we try to go back into that cell's properties.

5. Double click on the cell (now named **My Edited Copy**).

- The default now becomes the *Edit HTML Cell Content* dialog.

- To open the *Cell Content* dialog, click the little blue down arrow in the upper left corner of the cell (circled above) and choose it.