

Exporting to Excel

1. Show “Before” report and initial export (both kinds). Note misalignment of headings, fields in different rows, multiple rows.
2. In report options, check guidelines and rulers in design view and also snap to grid.
3. No overlapping fields.
4. Attach fields to guidelines, both horizontal and vertical, with no spaces between fields. Test by moving guideline.
5. Remove any “can grow” formatting.
6. Make all fields the same height (select all section objects)->format->size->same height->align bottoms.
7. Make all headings same height, even if entire heading doesn’t show this way. Attach headings to same guidelines as other report sections to appear in the same column.
8. Resize section to minimize height.
9. Export options: Regular export will produce an Excel spreadsheet that looks most like the original report. Data only ignores the reports appearance. For most purposes, regular export usually works best, in my opinion.
10. Set the column width to correspond to the report section that matters most, usually the detail or the group section where the bulk of your data is displayed.
11. Subreports/crosstabs. It is possible to attach subreports to guidelines to prevent them from wrapping to the next line, but BO claims the wrapping is built in by design.
12. 12. Show export version of CC Specific Program Report. Note that some reports cannot easily be exported because of suppression, use of the underlay function, etc. Can be exported, but duplicates occur.
13. Resource:
http://support.businessobjects.com/communityCS/TechnicalPapers/cr10_export_excel.pdf.asp

Plugging in Plan Numbers – For Report with Single Value Program Parameter.

1. Create a formula in the report header where you set enrollment and placement goals for the year for all programs where you have established goals.
2. Only have to change this formula once per year.
3. Explain use of select case and parens
4. Show how to format to allow for programs without established goals. Select all goal numbers->format->numbers->customize->suppress if zero. Select goal % for both enr goals and format to suppress if enr goal = 0. Repeat for both ee goals.
5. Format headings->format field->suppress->x+2 and enter formula to suppress if both variables are = 0.

Formatting Color.

1. Similarly, establish a criterion for when a field in the report will be colored (or underlined, or bolded, etc.) in a formula in the report header.
2. Format selected fields with formula that compares the currentfieldvalue with the value of the variable in the RH.
3. Show how you can change value in RH and affect multiple fields

Plugging in Plan Numbers – For Report with Multiple Value Program Parameter.

1. Show use of array. Goals are arrays, since multiple values. Use of ubound(); use of redim preserve; addition of subscripts.
2. Explain looping through the multiple program parameter selections.
3. Show formulas in main report, how need to loop through potential values. Use of additional variable to display the result.
4. For percent formulas, use of introductory clause checking for division by zero.

Adding Lines to Divide Report Sections.

1. Insert an additional report section.
2. Insert a line; resize section to minimize height.