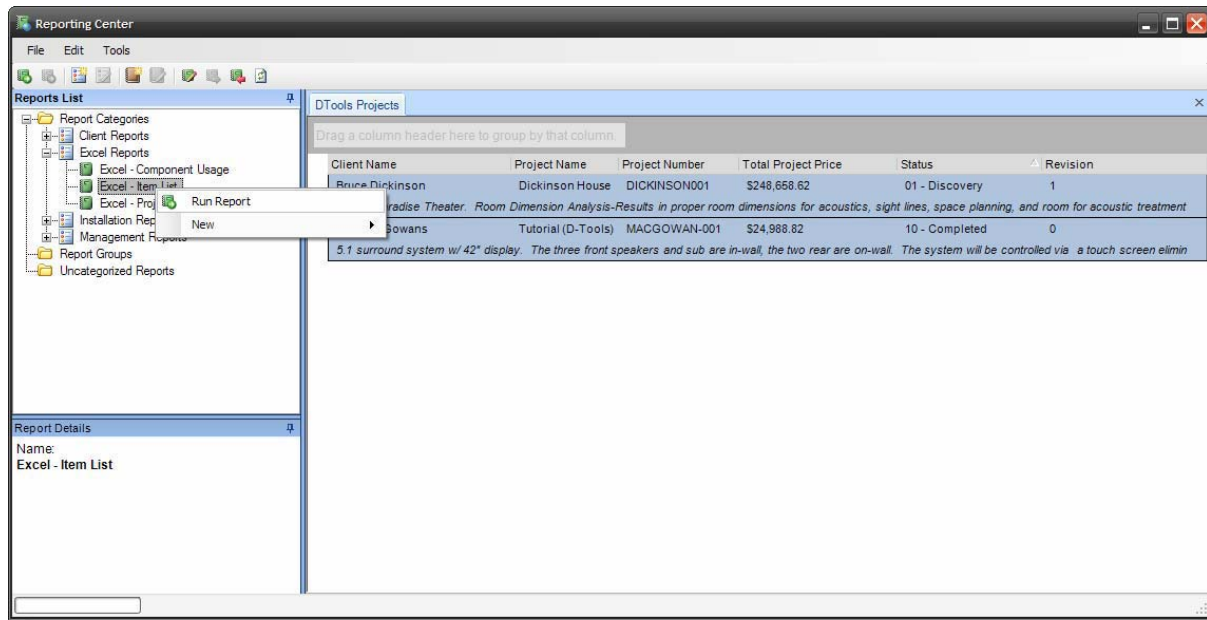


Excel Reports

Excel reports provide a powerful way to view data across projects. To run an Excel report, first select the projects you would like to use for your report in the projects list, then go to the Excel reports category in the reports list. Double-click or Right-Click > Run Report on the Excel report you would like to run.



Excel will open with the report displayed. You can format and/or save the report as desired.

Create a Custom Excel Report File

D-Tools provides a number of reports utilizing Pivot Tables and Pivot Charts in Excel. If you would like to create your own custom excel report, follow the steps below.

Link to D-Tools XML Schema

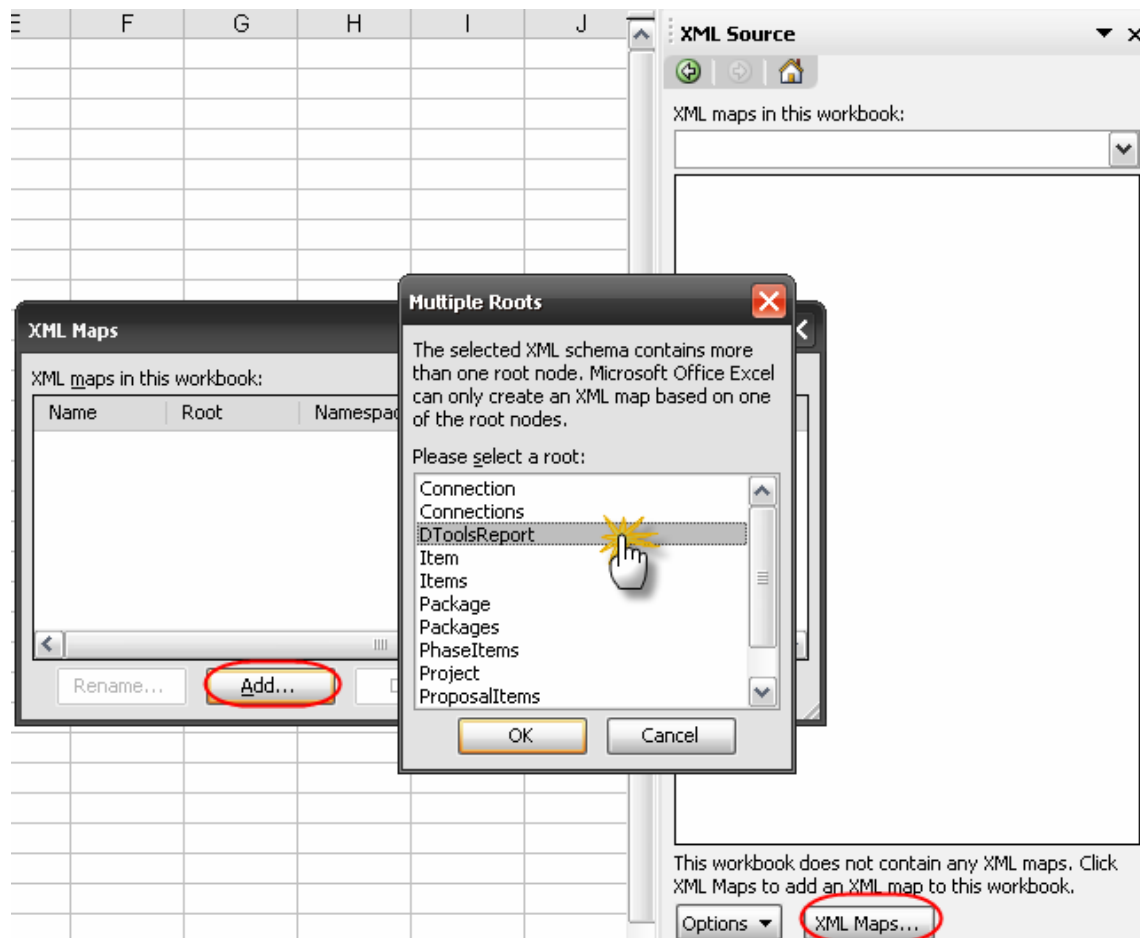
In Excel,

- 1) Go to View > Task Pane (Developer > Source in Excel 2007)
- 2) Go To XML Source (dropdown) (not needed in Excel 2007)
- 3) Click on XML Maps... (button)
- 4) Click on Add...
- 5) Copy this URL into the File Name line:

<http://www.d-tools.com/schemas/si5/reports/dtoolsreport.xsd>

6) Click Open

7) Select **DToolsReport** as the XML root node



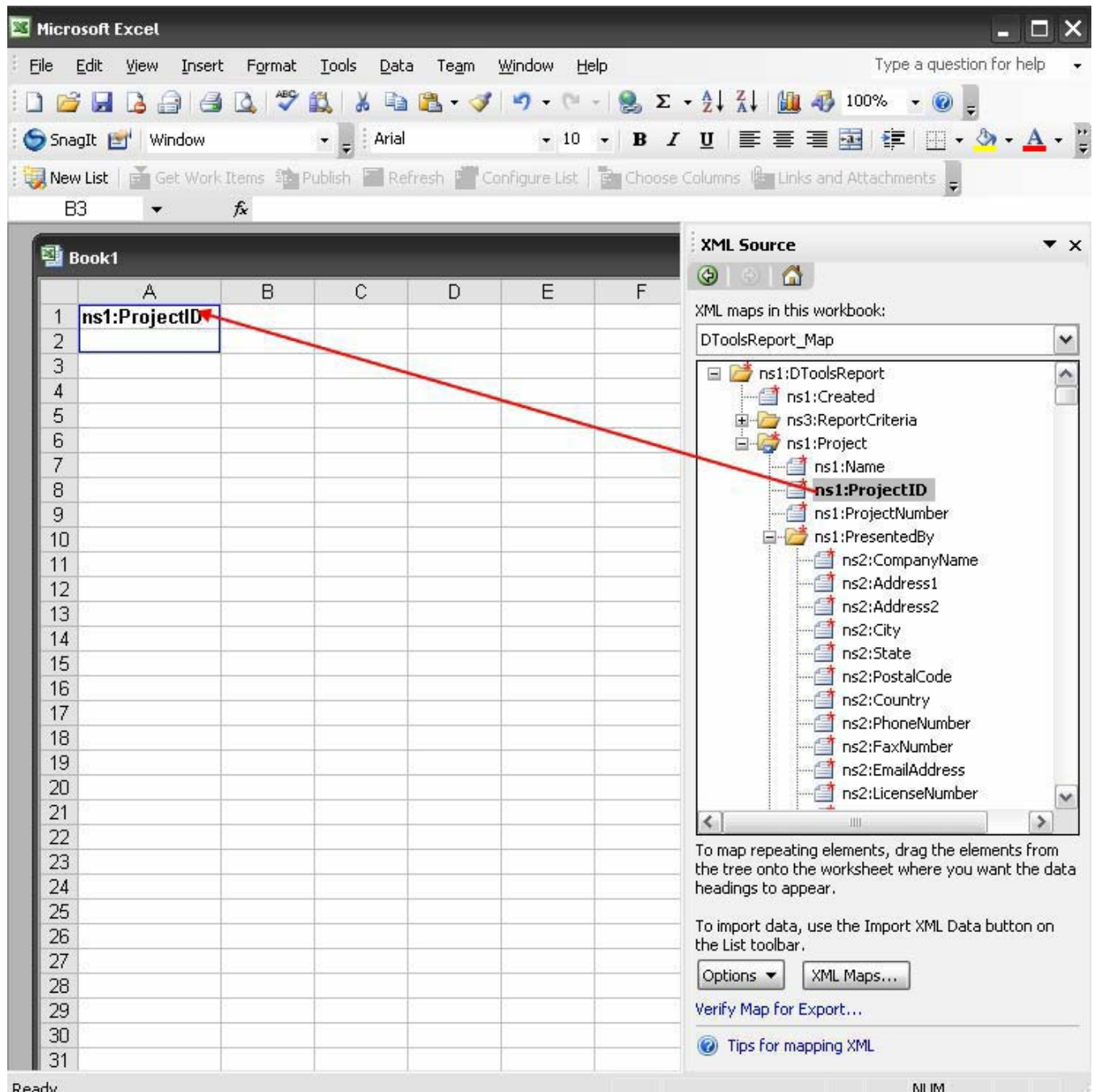
8) Click OK



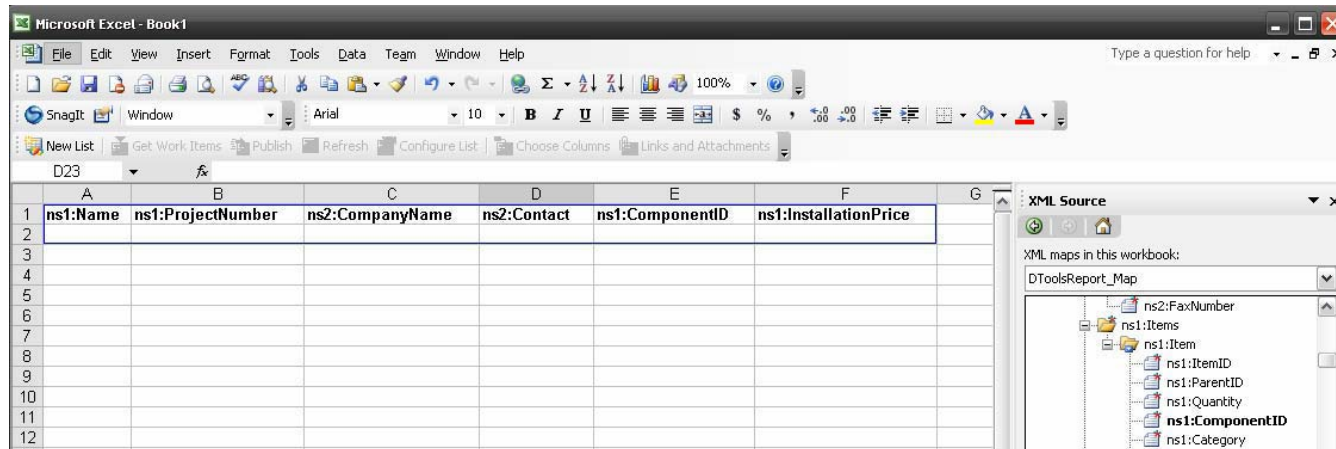
Note: You can map this same XML source more than once if you wish to map the XML data field more than once in the next step.

Map the Data Fields into Excel Columns

The Task Pane shows a list of all data fields available. You can drag and drop data fields directly from the Task Pane to an excel spreadsheet. This will add the data field to your report source data.



Keep adding fields until you have all of the data you wish to report on.



Load Sample Data into Excel for Design

In order create a design layout, you will need some sample data. This data will be replaced when you run the report from the Reporting Center, but is useful to see how your report behaves prior to this.

D-Tools provides sample data on your SI5 Install CD:

CD:\SampleFiles\Reports\Excel 2003\Excel Report Sample Data.XML

To load the sample data into your report, follow these steps:

- 1) Go to XML > Data > Import... (Developer > Import in Excel 2007)
- 2) Browse to the XML file containing the sample data ([CD:\SampleFiles\Reports\Excel 2003\Excel Report Sample Data.xml](#))

This will load the sample data into the spreadsheet so that you can design your report.

ns1:Name	ns1:ProjectNumber	ns2:CompanyName	ns2:Contact	ns1:ComponentID	ns1:InstallationPrice
Prison Cell	JOKER-AV-0001	Joker	Jack Nicholson	TRI-001	18.75
Prison Cell	JOKER-AV-0001	Joker	Jack Nicholson	PRE-001	56.25
Prison Cell	JOKER-AV-0001	Joker	Jack Nicholson	WAL-001	3.41
Prison Cell	JOKER-AV-0001	Joker	Jack Nicholson	CON-001	111.1
Chiller	MR FR-AV-0001	Mr Freeze		BOO-001	25.01
Igloo 2007	PENGU-0001	Penguin	Bernard Penguin	CAS-001	70.01
Igloo 2007	PENGU-0001	Penguin	Bernard Penguin	HAR-001	210.01
Igloo 2007	PENGU-0001	Penguin	Bernard Penguin	MD-001	70.01
Igloo 2007	PENGU-0001	Penguin	Bernard Penguin	TOU-001	210.01
Igloo 2007	PENGU-0001	Penguin	Bernard Penguin	CEI-001	

Create Pivot Tables Based on Imported Data Columns

Once you have imported the sample data, you can create your own report using Excel's reporting features, such as Pivot Tables and Pivot Charts. See the Microsoft Excel users guide for details on how to do this.

Create an Excel Report Based on Existing Excel Report

If you wish to create a copy of an existing Excel report for modification, you can find the Excel report files in the Standard_Reports and Report_Documents subfolders in your SI5 User Application folder.

Windows XP C:\Documents and Settings\<username>\Application Data\D-Tools\SI5\Reports

VISTA: C: Desktop\<username>\AppData\Roaming\D-Tools\SI5\Reports

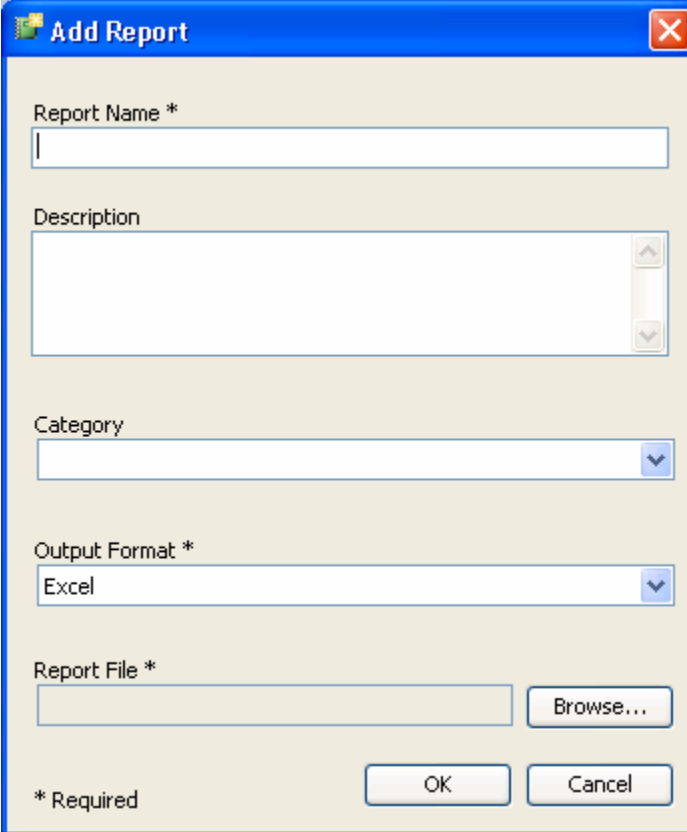


Do not modify these reports directly. Copy the files to a local folder, make modifications, and use the New Excel Report feature to import these into the Reporting Center.

Modifying the reports directly in these folders may cause instability and/or loss of reporting capabilities.

Link Excel Report to Reporting Center

Once you have created a custom Excel report, you can import it into the Reporting Center so that it will appear on your Reports List. To do this, go to the Reporting Center and to New... Excel Report in the File Menu. The Add Report Dialog will appear.

The image shows a Windows-style dialog box titled "Add Report" with a blue title bar and a red close button. The dialog has a light beige background. It contains several fields: "Report Name *" with an asterisk and a text input field; "Description" with a larger text area and vertical scrollbars; "Category" with a dropdown menu; "Output Format *" with an asterisk and a dropdown menu showing "Excel"; and "Report File *" with an asterisk, a text input field, and a "Browse..." button. At the bottom left, it says "* Required". At the bottom right, there are "OK" and "Cancel" buttons.

Add Report

Report Name *

Description

Category

Output Format *

Excel

Report File *

Browse...

* Required

OK Cancel

Enter the name of the report and a brief description. You can also choose which report category this will appear in. Output Format should always be "Excel" for Excel reports. Click **[Browse]** to find your custom Excel report file on your computer, then click OK to add the report to your list.

At this point the Excel report will appear in your report list and can be run just like any other report.