



Custom Excel Reporting – Part I, Creating a Report

With the release of ProTreat®, version 6.5, comes a new feature, *Custom Excel Reporting*. This feature allows you to completely customize the output data in ProTreat to be directly reported in Excel. This series of ProTips™ covers each aspect of the new feature.

A general report is generated from a result (.PTR) file. Once the simulation has completed running and you are viewing the results (.PTR) file, navigate to the *Reports* drop down at the top of the screen, as shown in Figure 1, and select *Custom Excel Reports*.

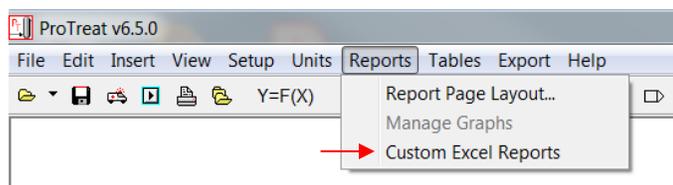


Figure 1. Reports Menu Layout

This opens the dialog box shown in Figure 2, where you can select and create templates as well as generate reports.

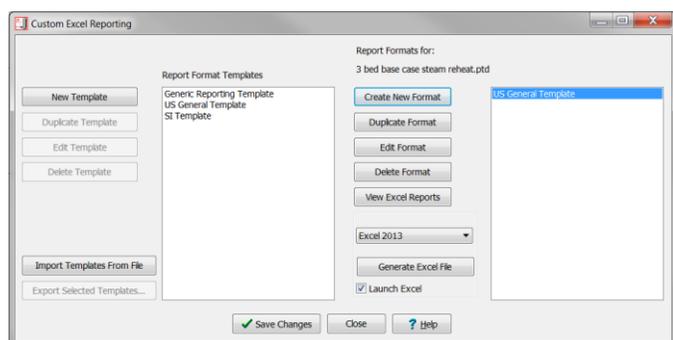


Figure 2. Custom Excel Reporting Dialog

Once the dialog is open, the far left side contains a number of different options for managing (creating, duplicating, editing, and deleting) templates. You also have the option to import and export templates that you have created, or that someone else has created, allowing you to share and receive templates within a company or with a customer. A list of available templates is directly to the right of those options. As defaults, there are three templates provided to every user (Generic, US General, and SI). The set of buttons on the right are for formatting reports. A format that has been created is unique to a particular simulation and, once built, will appear in the far right column with the options to duplicate,

edit, delete, or view an Excel report if it has been previously generated. If a report has been formatted, but not yet generated, you must first select the version of Excel, installed on your local machine, then select *Generate Excel File*. Checking *Launch Excel* automatically opens the report after it's been generated.

Selecting *Create New Format* will open a new dialog where you will be asked to give the report a name and select a template to base your report on, as seen in Figure 3.

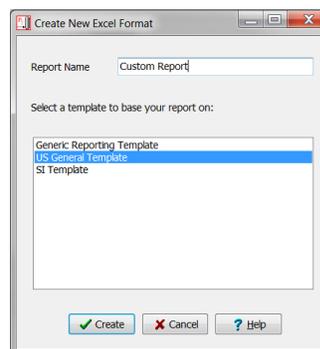


Figure 3. Create New Format Dialog

Once the desired starting template has been selected, click *Create* and that report format is now available in the far right window of available report formats. If there is nothing you wish to edit for that particular report, you can simply select *Generate Excel File* and the Excel report file for that flowsheet based on that format will be generated and saved in a location of your choosing.

In Part II of this series, we will discuss creating custom templates and the extent of customization available for both templates and formats.

PROTIP: In order to create a new format, you must have first created a ProTreat flowsheet or have a previously built flowsheet (.PTD) open; however, to generate the Excel report file, you must either first run the flowsheet and generate the results file (.PTR), or have open a .PTR file from a previous run. Files don't have to be converged; they just have to exist.

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