Custom Excel Reporting – Part II, Creating a Custom Template

Generally, you may tend to use a single layout structure when creating multiple reports either for familiarity with the layout, or as mandated by your company for general consistency. In order to streamline this, you are able to create custom templates that can be used over and over for different simulations and even among multiple people. Figure 1 shows the general layout of the *Custom Excel Report* dialog with the templates shown on the left-hand side of the box.
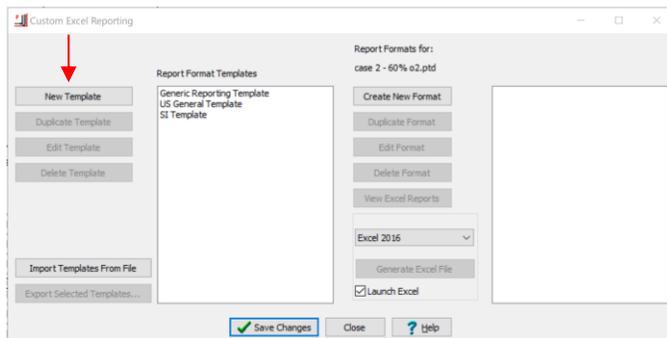

Figure 1. Custom Excel Report Dialog

To create a new template, simply select the *New Template* button at the top left. This will create a copy of the *Generic Reporting Template*. Once you have selected the "*New Copy of Generic Reporting Template*", select *Edit Template* which will open a new dialog box containing all of the editable features of the report as shown in Figure 2. Here you can rename the template to something more meaningful to you.

The left side of the dialog shows a tree of available items. These can be dragged up or down to re-order in any way desired. For example, if you wanted to have the blocks reported before the material streams in the excel file, left click and hold down on *Material Stream Options* and drag it down below *Block Options*. These tabs in the excel file will now show up after the blocks. This can also be done with any item within the tree; however, an item cannot be moved outside of the parent item (e.g., you cannot move *Overall* to be within *Block Options* as it must stay within *Material Stream Options*).

In Figure 2, on the right-hand side is a list of options available to the material streams. Here you are able to pick and choose which items you want to be reported. Similar to the main tree, these items can be moved up or down to be reported in any order desired. The checkbox *Sync Phase Options* allows you to make

changes in one phase with those same changes being propagated to the other phases automatically.
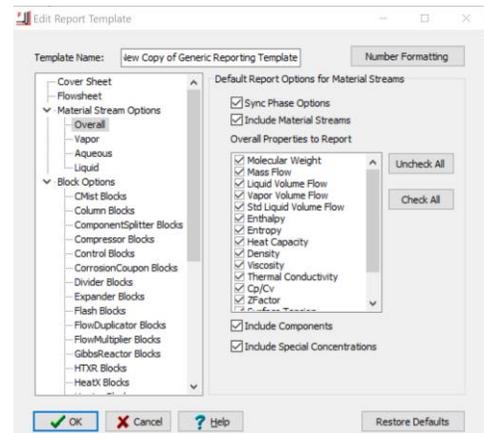

Figure 2. Edit Report Template Dialog

Figure 3 shows the optional *Number Formatting*. Here, you can specify how the numbers will be displayed in the excel file. Special exceptions can also be created to display certain item in custom formats.
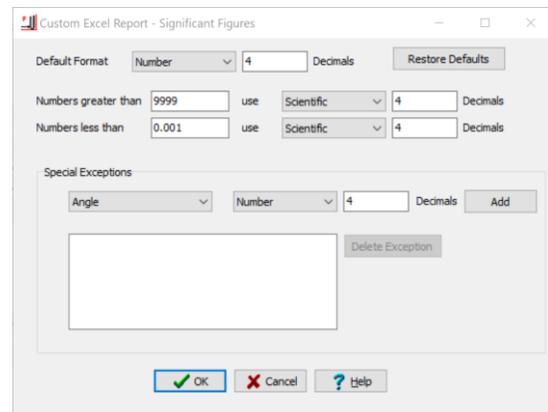

Figure 3. Number Formatting

PROTIP: Templates can be imported to and exported from a file to make it easy for a single template to be utilized within a large group.

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