

# **XLReportGen Frequently Asked Questions**

## **About**

### **What is XLReportGen?**

XLReportGen is a report generator for Microsoft Excel that outputs reports in Microsoft Excel spreadsheet format.

### **What can I do with it?**

If you know how to use Microsoft Excel and write SQL statements, you can use XLReportGen to create all kinds of reports as you need. The report generated using XLReportGen is a Microsoft Excel workbook.

### **What is the system requirement?**

XLReportGen 5.2:

- Microsoft Windows XP, Windows Server 2003, Windows Vista, Windows Server 2008, Windows 7 or later.
- Microsoft .NET Framework 4.
- Open XML SDK 2.5 for Microsoft Office.

XLReportGen 4.0:

- Microsoft Windows XP, Windows Server 2003, Windows Vista, Windows Server 2008, Windows 7 or later.
- Microsoft Office 2003, Office 2007, Office 2010 or later.
- Microsoft .NET Framework 3.5 SP1.

XLReportGen 3.8:

- Microsoft Windows 95, Windows 98, Windows NT, Windows 2000, Windows XP, Windows 2003 or later.
- Microsoft Office 97/98, Office 2000, Office XP, Office 2003 or later.

- Visual Basic 6.0 run-time environment

### Do I need to install Microsoft Office?

XLReportGen 5 was developed using OpenXML SDK. You do not need to install Microsoft Office for XLReportGen 5. However, XLReportGen 4 / XLReportGen 3 were developed using Microsoft Excel Visual Basic. You need to install Microsoft Office for XLReportGen 4 / XLReportGen 3.

### What are the differences between the different versions of XLReportGen?

	XLReportGen 5	XLReportGen 4	XLReportGen 3 / XLReportCom 1
Office API	OpenXML SDK	Microsoft Office Interop	Microsoft Excel Visual Basic
Programming Language	Visual Basic .Net	Visual Basic .Net	Visual Basic 6.0
Supported Operating System	Microsoft Windows XP, Windows Server 2003, Windows Vista, Windows Server 2008, Windows 7 or later.	Microsoft Windows XP, Windows Server 2003, Windows Vista, Windows Server 2008, Windows 7 or later.	Microsoft Windows 95, Windows 98, Windows NT, Windows 2000, Windows XP, Windows 2003 or later.
Need Office	No	Yes	Yes
Supported Office	-	Microsoft Office 2003 or later	Microsoft Office 97 or later
Other Software Required	Microsoft .Net Framework 4 and Open XML SDK 2.5	Microsoft .Net Framework 3.5	Visual Basic 6.0 run-time files
Supported Excel File Format	OpenXML Workbook	Excel 97-2003 Workbook, OpenXML Workbook	Excel 97-2003 Workbook, OpenXML Workbook
File Convertor	No	Yes	Yes
32-bit or 64-bit	32-bit and 64-bit	32-bit and 64-bit	32-bit

### Where can I find XLReportGen 4?

After you have installed XLReportGen 5, you can find “XLReportGen4” directory under the XLReportGen directory. The directory contains the files of XLReportGen 4.

### **What are the differences between the editions of XLReportGen?**

There are 2 types of editions issued for XLReportGen.

#### 1) XLReportGen Standard Edition

User can execute no more than 50 SQL statements in one report processing.

#### 2) XLReportGen Professional Edition

User can execute SQL statements unlimitedly in one report processing.

### **Do I need 32-bit XLReportGen or 64-bit XLReportGen?**

XLReportGen 3 is 32-bit software. XLReportGen 4 and XLReportGen 5 include 32-bit and 64-bit software.

32-bit XLReportGen can run on 32-bit or 64-bit windows. But it must run with 32-bit data provider (such as ODBC driver, OLEDB driver) and 32-bit Microsoft Office (XLReportGen 5 does not need Microsoft Office).

64-bit XLReportGen must run on 64-bit windows. And it must run with 64-bit data provider (such as ODBC driver, OLEDB driver) and 64-bit Microsoft Office (XLReportGen 5 does not need Microsoft Office).

### **Can I make the complex report using XLReportGen?**

Yes. This is a main feature of XLReportGen. The complexity might come from reports formatting as well as reports content.

- The complex report formatting

You design reports like layouts, styles, formats directly using Microsoft Excel.

You can take full advantage of Microsoft Excel including text formatting, number formats, text rotating, borders, colors, patterns, conditional formatting,

style, drawing, pictures, and more.

- The complex report content

In one report, you can execute more than one SQL statement, and get data using different queries. Further more, you can create a temporary table, prepare data using many SQL statements including INSERT/UPDATE/DELETE/INSERT SELECT, and then make a report.

**Do you have any server version which I can use on the server to generate the reports?**

No. But XLReportGen can be run on your desktop or server. So you can use XLReportGen on the server to generate the reports. If you want to run it in the background on the server, you need to run it in command line mode.

**When I run excelreport.exe from the command line, I receive a “excelreport’ is not recognized as an internal or external command, operable program or batch file.” error message.**

Your windows can not find the “excelreport.exe”.

1. You can refer to excelreport.exe as the full path.

For XLReportGen 32-bit,

```
"C:\Program Files (x86)\LJZsoft\ExcelReport.exe" c:\myreport.xrf -c
```

For XLReportGen 64-bit,

```
"C:\Program Files\LJZsoft\ExcelReport.exe" c:\myreport.xrf -c
```

2. You also can add the path of excelreport.exe to System PATH variable.

(1) Choose **Start -> Settings -> Control Panel**.

(2) Double-click **System**.

(3) Select the **Advanced** tab and then **Environment Variables**.

(4) In **System Variables**, look for **PATH**. Select **PATH**, and click **SET** button.

(5) Add the path of excelreport.exe and click **OK** button.

;C:\Program Files\LJZsoft

(6) Click OK button.

## Reporting with XLReportGen

### How does it work?

To create a report with XLReportGen, you should do as follows:

1. Create a report template file using Microsoft Excel, define the layouts, styles, formatting of reports.
2. Create an XRF file with an .xrf extension using XLReportGen. The XRF file tell XLReportGen how to extract data from database, and where and how to put data.
3. Run the XRF file to generate a report file.

### Where can I find some samples?

After XLReportGen is installed, some sample reports are installed too. The sample reports include a sample database, some report template files (.xlsx) and XRF files (.xrf). They are located in the ExcelReport directory under \Samples.

### What need I do to use samples?

To use these samples, you must add a data source named "Report Sample", and specify the database "Sample.mdb". If you have not installed MS access ODBC driver, please install it first.

Creating a System DSN for a Microsoft Access Database

1. Click the Windows **Start** button, choose **Settings**, and then click **Control Panel**.
2. Double-click **Administrative Tools**, and then double-click **Data Sources**

**(ODBC).** The **ODBC Data Source Administrator** dialog box appears.

3. Select the **System DSN** tab, and then click **Add** button.
4. Choose **Microsoft Access Driver (\*.mdb)**, then click **Finish** button.
5. In the **ODBC Microsoft Access Setup** dialog box, type **Report Sample** in the **Data Source Name** box.
6. Click the **Select** button, and browse to select **Sample.mdb**.
7. Click **OK** button to close the **ODBC Microsoft Access Setup** dialog box.
8. Click **OK** button to close the **ODBC Data Source Administrator** dialog box.

### **How can I use these samples?**

1. Run XLReportGen.
2. Open a XRF file. Click **Open** on the **File** menu.
3. Run the XRF file to generate a report. Click **Run** on the **Report** menu.
4. Open, view and check the report. Click **Open Report File** on the **File** menu.
5. Open, check the log file. Click **Open Log File** on the **File** menu.

The sample reports can be changed to adapt to your own needs.

### **When I use samples, I receive a "Selected Collating Sequence Not Supported" error message.**

This is a problem of multilanguage. You are trying to open a database or an object in a database that was created in another language edition of Microsoft Access. You can try as follow:

1. Open the database "sample.mdb" using Microsoft Access.
2. On the **Tools** menu, click **Options**, and then click the **General** tab.
3. Make sure that the **New Database Sort Order** is set to General and then click **OK**.

If you do not resolve the problem, please install or enable multilanguage support for your operating system. For more information, please refer to

<http://support.microsoft.com/default.aspx?scid=KB;en-us;q202150>

<http://support.microsoft.com/default.aspx?kbid=184988>

You can create a new database on your computer, export data from “sample.mdb”, and import into your database.

### **What is a report file?**

The report file is a Microsoft Excel workbook generated by XLReportGen.

### **What is a report template file?**

To make a report using XLReportGen, you should create a report template file first. This report template is a Microsoft Excel workbook that defines the layouts, formats and styles of the report. In the report template, you can input static content such as titles, descriptions, comments, a cover, a company logo, and set the format for the static content and data got from data sources.

### **What is an XRF file?**

To generate a report with XLReportGen, you must create an XRF file with an .xrf extension. The XRF file contains information such as the name of the report template file, the name of the report file, log file name, data sources, parameters and functions. The XRF file tells XLReportGen how to get data from data sources and how to put data into a report.

### **What is a function?**

A function includes a SQL statement and some arguments. A function can be used to execute a SQL statement, and tell XLReportGen whether or how to add data into a report.

### **How can I connect a data source using a connection string?**

To write a connection string, please refer to

<http://www.connectionstrings.com>

### **Instead of SELECT statements can I use Stored Procedures?**

Yes, you can use Stored Procedures.

### **When I execute a SQL statement, I receive an "ODBC driver does not support the requested properties." error message.**

It probably is a wrong SQL statement. Such as a missing column, or syntax error.

### **When I execute a SQL statement, I receive an " Too few parameters. Expected 1." error message.**

It is a wrong SQL.

### **How can I test a SQL statement?**

You can test SQL statements using Microsoft Query that is a component of Microsoft Office. You can find it under the installation directory of Microsoft Office. For example,

"C:\Program Files\Microsoft Office\OFFICE11\MSQRY32.EXE"

### **How can I sort data?**

Use SQL to sort your data. In a SELECT statement, you can use the ORDER BY clause to have your results displayed in a sorted order.

### **How can I have total?**

There are two ways.

1. You can add the totals using the math functions of Microsoft Excel, such as



SUM. For more detail information, refer to “Using Excel Formulas” in XLReportGen Help.

2. You can use the aggregate functions in SQL statement, such as COUNT, SUM, AVG, MAX, MIN.

(1) In the fixed table report, you can add a total directly using a separate SQL.

(2) In the variable table report, you must add the total first using a fixed table report function before you use the variable table report function. Because the cell address of the total field will change after you use the variable table report function.

### **How can I group data?**

To group data in a report, you should use GROUP argument in the REPORT function. For more detail information, refer to XLReportGen Help and the samples customer\_profile.xrf, invoice.xrf, product\_catalog.xrf and sales\_detail.xrf within XLReportGen.

### **How can I make sub reports within the main report?**

A subreport is a report within a report. A subreport would typically be used to perform one-to-many lookups such as Customer / Order / OrderDetails.

To make sub reports within the main report,

1. Write a JOIN SQL statement to get data from two or more tables. For example, you can join Customers, Orders and OrderDetails tables.

2. Use GROUP argument in the REPORT function.

For more detail information, refer to the samples invoice.xrf, product\_catalog.xrf and sales\_detail.xrf within XLReportGen.

### **How can I have sub-totals for each group?**

To add subtotals, you can use the functions of Microsoft Excel or aggregate

functions in SQL statement.

1. You can add sub-totals using math functions of Microsoft Excel, such as SUM.

(1) The range of SUM function should contain cells for detail records in the report template file.

(2) The range of SUM function must contain at least one row/column that is not included in the range used for the details. For example, the row 13 is defined for the details, you should add blank row 14, and write the function as SUM(H13:H14). If you do not want to show the blank row in the report, you may hide the row.

(3) You should use the relative references. For example, SUM(H13:H14). Microsoft Excel will change the function automatically when XLRReportGen adds some rows in the report.

2. If you want to have a total and sub-totals,

(1) You can add the total using SUMIF function. The range of SUMIF function must contain one row/column that is not included in the range of group. For example, the range of group is "1:15", you should add blank row 16, and write the function as SUMIF(G:G,"Subtotal:",H1:H16). You may hide the blank row.

(2) You can add the total using the aggregate function in SQL statement. You must add the total first using a fixed table report function before you use the variable table report function. Because the cell address of total field will change after you use the variable table report function.

3. You can add sub-totals using the aggregate function in SQL statement too.

(1) Use aggregate function and GROUP BY clause, get summary data for each group, and insert results into a temporary table.

(2) If you have the different kinds of summaries, repeat the step 1, and insert results into another temporary table.

(3) Use the variable table report function, and join the detail data and the

summary data using JOIN. The summary fields must be included in the group list.

For more detail information, please refer to the samples invoice.xrf and sales\_detail.xrf within XLReportGen.

### **How can I create charts?**

To create a chart in a report, you should create the chart in the template file.

You can create a chart on its own sheet or as an embedded object on a worksheet.

1. First enter the sample data for the chart in the template file.
2. Then select that data and use the Chart Wizard to step through the process of choosing the chart type and the various chart options.
3. Customize your chart.
4. Delete the sample data.
5. Write functions in an XRF file to input the data.

For more detail information, please refer to the sample monthly\_sales.xrf within XLReportGen.

### **How to use parameters?**

In SQL statements, you can use parameters.

1. To use a parameter, you must declare it first. A parameter has a name, a title and a default value. To define a parameter, click **Configuration** on the **Report** menu, and click the **Parameter** tab

2. In SQL statements, use the parameter name.

XLReportGen will replace the parameter name with the actual value before it submits the SQL statements to data sources.

### **Example**

Define a parameter as follows:

Name: \$CustomerName

Title: Customer Name

You can use the parameter name "\$CustomerName" in SQL statements. The parameter name in SQL statements should be delimited by quotation mark.

For example:

```
SELECT CompanyName
, CityName
, CountryName
, ContactName
FROM Customers, Cities, Countries
WHERE Customers.CityCode = Cities.CityCode
AND Customers.CountryCode = Cities.CountryCode
AND Customers.CountryCode = Countries.CountryCode
AND CompanyName LIKE '$CustomerName%'
```

**I need to change paths for both exported report and template location. Is there any way?**

You can use parameters in the path and name of the report file, template file and log file. For example, you define a parameter \$CustomerID, you can name the report file as follows:

```
report\report_$CustomerID.xlsx
```

```
report\$CustomerID\report.xlsx
```

**Can I place the data into columns rather than rows?**

Of course, just write FILLORDER=col in REPORT function. For example, there are 1 field and 10 records, you can show them as 1 row and 10 columns on report.

### **How to create Microsoft Excel reports with pictures?**

You can insert pictures into your report from using many popular graphics files XLReportGen.

1. Store the path and name of the graphics files in the database.
2. Identify the image fields in the report function.
3. To specify the positioning option and size, you can write a formatting expression into the cell in the report template file.

XLReportGen will read the graphics files, insert them into the report, and position and size the pictures. For more detail information, refer to the samples `employee_profile.xrf` and `product_catalog.xrf` within XLReportGen.

### **Do I need to execute more than 1 SQL statement in one report processing?**

In most of reports, you just need to execute one SQL statement. But sometimes, you want to execute more than one SQL statement in one report processing.

- The data are located in different tables or databases, and you get data using different queries.
- There are many reports in one report file.
- You want to create a temporary table, prepare data using many SQL statements including INSERT/UPDATE/DELETE/INSERT SELECT, and then make a report.

### **How many SQL statements can I execute in one report processing?**

It is dependent on the license of XLReportGen you have purchased. For detailed information, see Licenses.

### **I want to programmatically change some of the functions in the xrf file.**

## **How?**

The XRF file is a text file. You can write a program to make an XRF file using C, perl or DOS shell, and then run XLReportGen to generate report. These steps can be written into a batch file.

## **I hope the report can not be modified. How can I do?**

You can protect the generated report so that it can not be modified. To protect the report, select the **Protect Report** check box in the **Configuration** dialog box.

## **Support**

### **How much will I pay for the technical support? Is it free?**

Yes, it's completely free for all.

### **I have more questions - who should I write to?**

Please send your additional questions to [support@ljzsoft.com](mailto:support@ljzsoft.com).