
Chapter 16

Exporting Data

Introduction

This chapter explains how to export R&R report data to a text file, Xbase file, worksheet file, Excel 5.0 PivotTable, Excel 5.0 chart, Rich Text Format (RTF) file, text data file, or Word merge file. This information is presented in the following sections:

- Exporting to an Excel 5.0 Chart
- Exporting to an Excel 5.0 PivotTable
- Exporting to a Rich Text Format (RTF) File
- Exporting to a Text File
- Exporting to a Text Data File
- Exporting to a Word Merge File
- Exporting to an Xbase or Worksheet File

You access each of these export options by first selecting File ⇒ Export to display the Export dialog (see Figure 16.1). In the Export Type list box, highlight the type of export you want and then select Edit to define the results of the export.



Figure 16.1 Export Dialog

Note that in order to export to an Excel PivotTable or chart, you must have Excel 5.0 installed on your system.

“Send via MAPI” enables you to export a text, RTF, Word Merge, Xbase, or worksheet file as a mail attachment. This option is available only if you have MS Mail or another email application that supports MAPI (Messaging Applications Programming Interface). If you turn on this option by clicking in the check box, R&R will start up or switch to your email application and attach the exported file to a mail message.

Exporting to an Excel 5.0 Chart

R&R also employs OLE automation to coordinate with Excel 5.0 in the creation of charts. When you select Excel Chart as the export type and specify the data elements of the chart, R&R generates the data and causes a chart to be created in Excel.

General Procedures

Follow these general procedures to export report data to an Excel 5.0 chart (details on some of these steps are provided in the next section):

1. On the Export dialog box, highlight “Excel Chart” in the list box and select Edit.
2. On the Excel 5.0 Chart Options dialog (see Figure 16.2), highlight a field in the Fields list that will supply the category (x-axis) values for the chart. Click the right arrow button next to the Categories box to insert this field name there.
3. Highlight a field in the Fields list that will supply the values (y-axis) for the chart. Click the right arrow button next to the Values box to insert this field name there.
4. In the Value Type list box, highlight the total type that you want applied to the field value.
5. By default, “Export Summary Information Only” is selected. To export only summary field data, leave this box checked; to export data for all records, click the check box to remove the check mark.

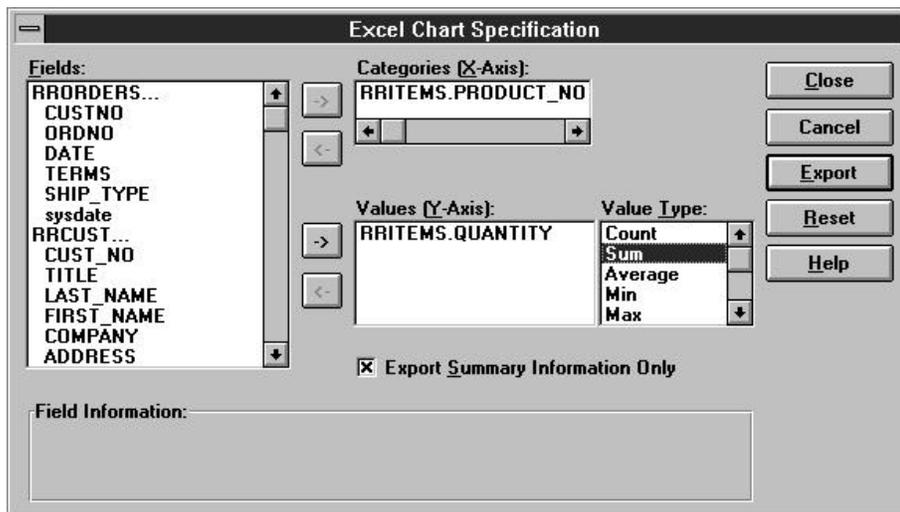


Figure 16.2 Excel 5.0 Chart Specification Dialog

If you export only summary field data, R&R performs the necessary totaling and passes only the total data to Excel; this method is efficient but limits how much additional manipulation of the data you can perform in Excel. If you export all field data, R&R passes all of the specified record data to Excel and Excel performs the totaling; this method is less efficient but allows greater flexibility in working with the exported data in Excel.

6. Select Export. R&R exports the data to a temporary file, starts Excel (or switches to Excel if it is already running), and creates the chart in Excel.
7. Modify the chart as necessary; then save the Excel workbook file. See your Excel documentation for detailed information about using Excel.

Note that the Excel 5.0 Chart settings are saved with the R&R report, but that any changes you make to the chart in Excel will not be reflected in R&R.

Specifying Data Elements for a Chart

Suppose you want to create a chart that shows the total quantity ordered for each product number. You create an R&R report using the tables RRITEMS and RRORDERS; two of the fields in the report are PRODUCT_NO and QUANTITY. To create a chart from this data, you would do the following:

1. Select File ⇒ Export and specify “Excel Chart” as the export type. Select Edit.
2. Highlight PRODUCT_NO in the Fields list. Click the right arrow button next to the Categories box to insert this field name there.
3. Highlight QUANTITY in the Fields list and click the right arrow button next to the Values box to insert this field name there.
4. Highlight Sum in the Value Type box; then select Export.

An Excel worksheet is displayed, with the exported R&R data arranged as a chart (see Figure 16.3). Use Excel to modify, format, and print the chart.

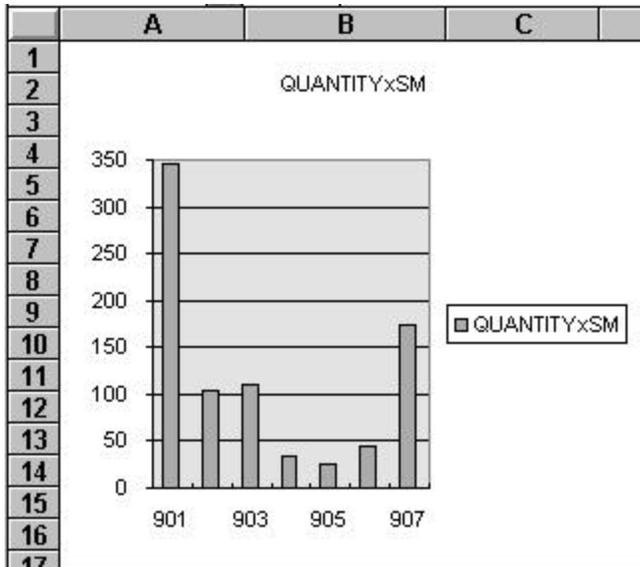


Figure 16.3 Portion of Excel 5.0 Chart after Export

Exporting to an Excel 5.0 PivotTable

R&R employs Object Linking and Embedding (OLE) automation to coordinate with Excel 5.0 in the creation of crosstab reports. When you select Excel PivotTable as the export type and specify the data elements of the crosstab, R&R generates the data and causes a PivotTable to be created in Excel.

General Procedures

Follow these general procedures to export report data to an Excel 5.0 PivotTable (details on some steps are provided in the next section):

1. On the Export dialog box, highlight “Excel PivotTable” in the list box and select Edit.

The Excel PivotTable Specification dialog shown in Figure 16.4 displays.

2. Select one or more fields in the Fields list box to be inserted as a Row label, Column label, or table cell value in the crosstab (see the next section of this chapter for information on each of these steps).

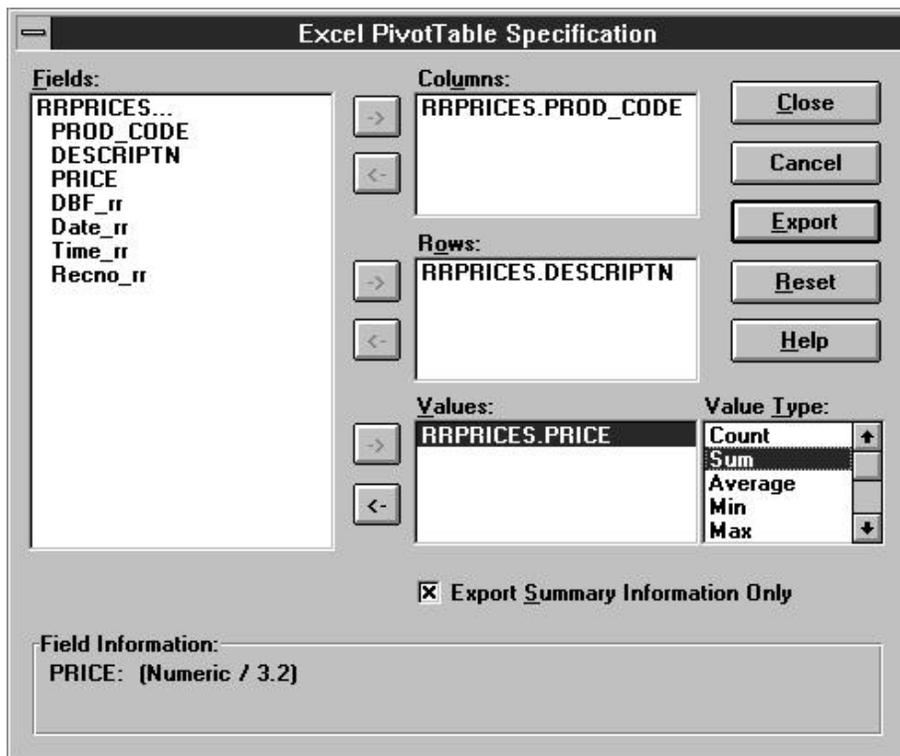


Figure 16.4 Excel PivotTable Specification Dialog

3. By default, “Export Summary Information Only” is selected. To export only summary field data, leave this box checked; to export all field data, click the check box to remove the check mark.

If you export only summary field data, R&R performs the necessary totaling and passes only the total data to Excel; this method is efficient but limits how much additional manipulation of the data you can perform in Excel. If you export all field data, R&R passes all of the specified record data to Excel and Excel performs the totaling; this method is less efficient but allows greater flexibility in working with the exported data in Excel.

4. Select Export. R&R exports the data to a temporary file, starts Excel (or switches to Excel if it is already running), and creates the PivotTable in Excel.
5. Modify the PivotTable as necessary; then save the Excel workbook file. See your Excel documentation for detailed information about using Excel.

Note that the Excel 5.0 PivotTable settings are saved with the R&R report, but that any changes you make to the PivotTable in Excel will not be reflected in R&R.

Specifying Labels and Cell Data for the Crosstab

The fields that you select using the buttons next to the Columns and Rows boxes on the PivotTable dialog become the labels for the x axis (Columns) and y axis (Rows) of the resulting crosstab. The combination of the field that you insert in the Values box and the Value Type you specify for that field supplies the values for the crosstab cells.

Take the simple example of a report that draws data from three tables, RRORDERS, RRPRICES, and RRITEMS. Suppose you want to create a crosstab that uses product descriptions as the row labels and order dates as the column labels. Suppose also that you have defined an R&R calculated field call ORDER_TOT that multiplies quantity times unit price.

Your goal is to create a crosstab that uses product descriptions as the row labels and order dates as the column labels and that inserts the total order amount for each date in the crosstab cells.

After creating an R&R report that provides the necessary field values, you would do the following to create such a crosstab:

1. Select File ⇒ Export and specify “Excel PivotTable” as the export type. Select Edit.

2. On the Excel PivotTable Specification dialog (see Figure 16.4), all fields from the report's composite record structure are shown in the Fields list box. In the Fields list box, highlight the field that you want to supply values for the Column labels (in this case, the DATE field) and click the right arrow button next to the Columns box.
3. In the Fields list box, highlight the field that you want to supply values for the Row labels (in this case, the DESCRPTN field, which contains the product names) and click the right arrow button next to the Rows box.
4. In the Fields list box, highlight the field that you want to serve as the basis for the crosstab cell data (in this case, the ORDER_TOT field) and click the right arrow button next to the Values box. Then in the Value Type box select the total type that you want applied to the field value (in this case, Sum).
5. Select Export. R&R exports the data to a temporary file and launches Excel (or switches to it if it is already running). The R&R OLE Driver dialog displays a series of informational prompts ("Starting PivotTable Module," Reading in Exported Data," and "Creating PivotTable") as the crosstab is set up in Excel.
6. An Excel worksheet is displayed, with the exported R&R data arranged as a PivotTable (see Figure 16.5). Use Excel to modify, format, and print the crosstab.

	H	I	J	K	L	M	N	O
1	Sum of order_totSM	DATE						
2	DESCRPTN	2/10/94	2/16/94	2/22/94	3/2/94	3/6/94	3/8/94	3/10/94
3	PC Com	1998	0	1498.5	2497.5	999	999	249.75
4	PC Database	11920	0	9685	9685	6705	3725	1490
5	PC Graphics	0	4980	0	0	1245	0	0
6	PC Project Planner	0	1490	2235	0	0	2235	0
7	PC Publisher	0	1245	0	0	1245	0	0
8	PC Spreadsheet	1490	1490	6705	0	1490	2235	0
9	PC Word Processor	0	4980	0	0	1245	0	11205
10	Grand Total	15408	14185	20123.5	12182.5	12929	9194	12944.75

Figure 16.5 Portion of Excel 5.0 PivotTable After Exporting

Exporting to a Rich Text Format (RTF) File

Use this export option to export report data to a Rich Text Format file. Rich Text Format files can be imported by most popular word processing programs, including Word for Windows.

To export a report to a Rich Text Format (RTF) file, do the following:

1. Select File ⇒ Export, highlight “Rich Text Format (RTF)” in the export type list, and select Edit.
2. Enter a name for the export file in the File Name edit box.
3. Select Export.

Note the following:

- Lines, boxes, and images are not included in an RTF export.
- Text/data within Freeform lines will be positioned at the bottom of that line.
- For snaked-column reports, data will be exported in a single column; you can then edit the RTF file using a word processor to restore the desired format.
- Page setup settings such as margins and page size are included in an RTF export; therefore, select an appropriate printer before exporting.

Exporting to a Text File

Use this option to export report data to an unformatted text file. Exporting to a text file is useful if you plan to include report data in a word processing document or import it into a desktop publishing program. When you export to a text file, R&R exports all the data on every line of the report, including text fields.

To export report data to a text file:

1. On the Export dialog, highlight “Text” in the list box and select Edit.

The Text Export dialog shown in Figure 16.6 displays.

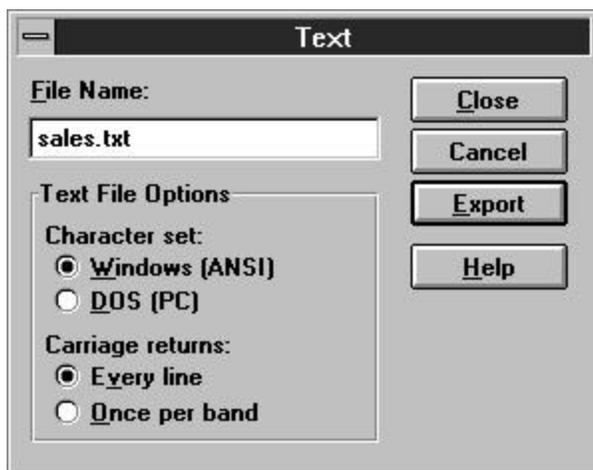


Figure 16.6 Text Export Dialog

2. In the File Name box, enter a file name, optionally including a path and file extension. If you do not include a path, R&R creates the file in the program directory.
3. Choose the options you want in the Text File Options box:
 - ◆ Select either Windows (ANSI) or DOS (PC) character set. In general, you should select Windows (ANSI) if you plan to import the file into a Windows word processing or desktop publishing application; select DOS (PC) if you plan to import the file into a DOS word processing or desktop publishing application. The default is Windows (ANSI).
 - ◆ In the Carriage returns box, select either Every Line (to insert a hard return after every line in the report output) or Once per Band (to insert a hard return after each band area in the report output). The default is Every Line.
4. To generate the file, select Export.

NOTE When exporting to a text file, R&R ignores lines, boxes, and images, but does export text and memo fields.

Exporting to a Text Data File

Export to Text Data File enables you to export report data to a text file using one of several separators or delimiters.

To export report data to a Text Data file:

1. Select File ⇒ Export, highlight “Text Data File” in the export type list, and select Edit.

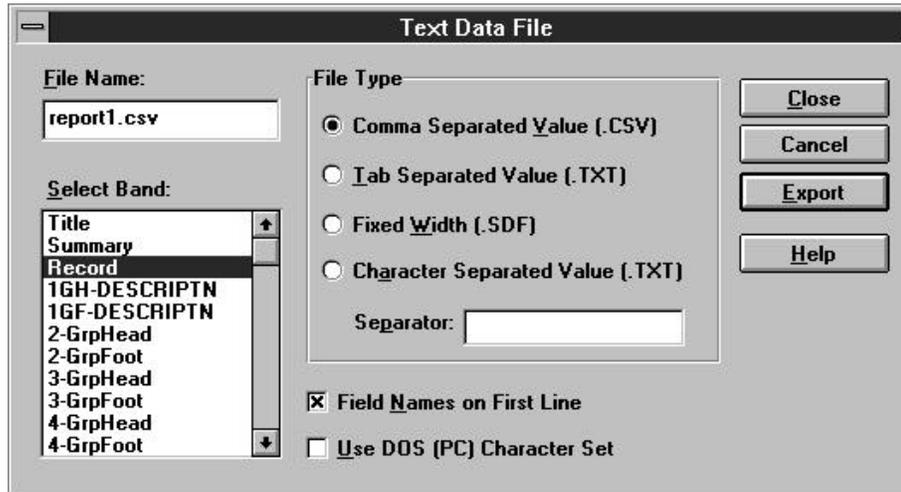


Figure 16.7 Text Data File Export Dialog

2. Enter a name for the export file in the File Name box (default extension is determined by the File Type you select), optionally including a path.
3. In the Select Band box, highlight the report band containing the data to be exported.
4. In the File Type box, select Comma Separated Value, Tab Separated Value, Fixed Width, or Character Separated Value.

If you select Fixed Width, data will be exported using the field widths as defined in R&R. If you select Character Separated Value, in the Separator box enter the character that will serve as a field separator in the exported file.

5. By default, field names are included as column headings on the first line of the export. To prevent field names from being included, turn this setting off.
6. By default, data is exported using the Windows (ANSI) character set. To use the DOS character set instead, click the “Use DOS (PC) Character Set” check box to turn that setting on.
7. Select Export.

Note that all numeric data is exported in Fixed numeric format and all date/datetime data is exported in Windows International format. To retain either numeric or date/datetime field formats as they are specified in the report, you can include one or both of the following entries in the [Export] section of RSW.INI:

CSVKeepNumFormats=1

CSVKeepDateFormats=1

Exporting to a Word Merge File

Export to Word Merge File enables export to a file that can be used as the source of data for a Word for Windows Print Merge or Mail Merge. The Word Merge dialog is similar to the Text Data File dialog, except that the Fixed Width and Character Separated Values options in the File Type box are grayed out, as is the “Use DOS (PC) Character Set” setting.

To export report data to a Word Merge file:

1. Select File ⇒ Export, highlight “Word Merge File” in the export type list, and select Edit.
2. Enter a name for the export file in the File Name box (default extension is determined by the File Type you select), optionally including a path.
3. In the Select Band box, highlight the report band containing the data to be exported.
4. In the File Type box, select Comma Separated Value or Tab Separated Value.
5. By default, field names are included as column headings on the first line of the export. To prevent field names from being included, turn this setting off.
6. Select Export.

Exporting to an Xbase or Worksheet File

When you export report data to an Xbase or worksheet file, you choose the band line type (for example the Record or Summary band) that contains the data you want to export. R&R will export all the fields on every line in the specified band. After exporting the data in the selected band to a worksheet file, you can use the file with a spreadsheet program such as Excel or Quattro Pro; after exporting to an Xbase file, you can use the file

with any Xbase-compatible program or with R&R itself. (Note that when exporting to database and worksheet files, R&R ignores text fields, memo fields, lines, boxes, and images.)

To export report data to an Xbase or Worksheet file, do the following:

1. On the Export dialog box, highlight either “Xbase” or “Worksheet” in the list box and select Edit.

Depending on the export type, either the Xbase Export dialog (shown in Figure 16.8) or the Worksheet Export dialog displays.

2. In the File Name box, enter a file name, optionally including a path and file extension. If you do not include a path, R&R creates the file in the program directory.
3. In the Select Band box, highlight the band containing the data you want to export; then select Export. For example, to export data contained in the Summary band area of your report, highlight “Summary” in the list box and select Export.

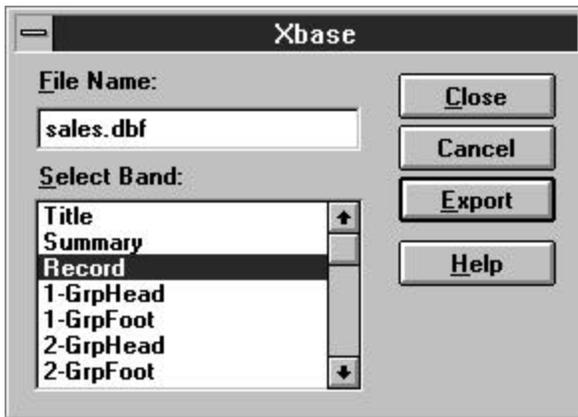


Figure 16.8 Xbase/Worksheet Export Dialog