Chapter 6: Tips and Tricks

- Table Selection Techniques
- Inserting Vertical Lines
- Styles and Backgrounds
- One Record per Page
- Automating the Opening of Reports
- Using Special Fields in Labels
Table Selection Techniques

- Tips for selecting multiple items in a table

To select non-adjacent columns, use the CTRL+click to select multiple columns in the column control bar.

To select a contiguous block of columns, click the first column in the column control bar, then use the Shift+click to select the last column to select all columns between them.

To select all items in all columns, including column headings, calculated columns, subtotals and grand totals, use Alt+click in the column control bar.

To select all items in a band, use Alt+click.
Inserting Vertical Lines

- You can add column separators by inserting a vertical line in the detail band

To insert a vertical line in a table:
- double-click the detail band to place it in insertion mode
- using the Line tool on the Drawing toolbar, draw a short vertical line in the detail band
- change the line’s appearance through its Properties

<table>
<thead>
<tr>
<th>Territory</th>
<th>Country</th>
<th>Year</th>
<th>SUM Order Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia</td>
<td>Australia</td>
<td>1997</td>
<td>917,066</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1998</td>
<td>1,004,760</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1999</td>
<td>1,112,232</td>
</tr>
<tr>
<td></td>
<td>China</td>
<td>1997</td>
<td>373,755</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1998</td>
<td>387,183</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1999</td>
<td>458,571</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>1997</td>
<td>398,513</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1998</td>
<td>398,863</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1999</td>
<td>411,977</td>
</tr>
<tr>
<td>Europe</td>
<td>France</td>
<td>1997</td>
<td>1,266,079</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1998</td>
<td>1,207,027</td>
</tr>
</tbody>
</table>
Styles

- Styles apply to tables
- Styles contain characteristics of a table, such as font, color, calculations, grouping
- Style files have a .tpf extension

Styles define the characteristics of a table, such as the font size and style of the title, column headings, and data as well as any colors you've applied. Styles can also define groups, include calculations, and suppress duplicates.

You can use the styles provided in the Presentation Designer when you create a table, or you can create your own styles and apply them to a table.

Any style that you or someone in your organization creates is saved with the extension .tpf.

To create a style:
- create a table
- organize the data in the report and apply the formatting you want
- choose Format > Table > Style > Save
- in the Save As dialog box, specify the name of the file
- click Save

To apply a style to an existing table:
- click anywhere in a table, then choose Format > Table > Style > Apply
- in the Open dialog box, choose a style, then click Open

To apply a style to a new table:
- on the Style page of the Presentation Designer, click Browse
- choose a customized style
- click Open
- follow the rest of the steps in the Presentation Designer
- click Finish
Backgrounds

- Backgrounds can be used with all reports
- They provide a consistent look
- Background files have a .tpl extension

Backgrounds allow you to apply a consistent look from report to report. When you’re creating reports on a regular basis, backgrounds eliminate the need to specify formats each time. They’re particularly important when you want to create professional-looking reports for external use (to be sent to clients, customers, or shareholders). Backgrounds provide company identification and help you adhere to corporate standards by using consistent logos, mastheads, and fonts.

Backgrounds contain the layout of a report, and define its overall look. They can include lines, borders, colors, graphics, page numbering, and the date a report was created. They can also include text objects that aren’t associated with particular data (for example, rich text objects and text labels but not special fields that contain prompt values from a query).

To create a background:
- create a report
- add the items you want the background to contain
- format the items, arrange them, and specify on which pages of the report you want them to appear
- choose File > Save As
- in the Save As dialog box, choose Template (*.tpl) from the Save As Type list
- specify the name and location of the file, then click Save

To apply a background:
- choose Format > Report > Set Background
- in the Open dialog box, choose a background with the extension .tpl, then click Open

See the example on the next page.
Applying Backgrounds

To reach us by phone, call toll free:
1-877-FLY HUMM (1-877-359 4866)
Outside North America: +1.416.496.2200
September 15, 1999

Background files can't be modified. Save the background as a report as well as a background file. To modify a background, open the corresponding report. Make the changes you want, save the report, then apply the changes to the background.

<table>
<thead>
<tr>
<th></th>
<th>Order Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td></td>
</tr>
<tr>
<td>CLIENT</td>
<td>37,525</td>
</tr>
<tr>
<td>VAR</td>
<td>15,215</td>
</tr>
<tr>
<td>Americas</td>
<td></td>
</tr>
<tr>
<td>CLIENT</td>
<td>8,600</td>
</tr>
<tr>
<td>VAR</td>
<td>8,845</td>
</tr>
<tr>
<td>Australasia</td>
<td></td>
</tr>
<tr>
<td>CLIENT</td>
<td>36,175</td>
</tr>
<tr>
<td>VAR</td>
<td>&lt;null&gt;</td>
</tr>
</tbody>
</table>

Report containing a crosstab

To reach us by phone, call toll free:
1-877-FLY HUMM (1-877-359 4866)
Outside North America: +1.416.496.2200
September 15, 1999

Crosstab report with the background applied to it
Making Objects Repeat

- Change the properties of an object in the report to make it repeat on subsequent pages

To add an object to multiple pages:

- add text, graphics, or context-sensitive title (such as a page number) to a report
- select the items, then choose Format > Properties
- in the Properties dialog box, click the General tab
- on the General page, under Repeat Every, specify how often horizontally and vertically you want the object to appear. (Specify 1 for every page, 2 for every second page, and so on.)
- click OK
One Record per Page

- You can create a report that displays one record per page
- You can also create a title page for your report

To create a report that displays one record per page:
- select the detail band
- choose Format > Table > Page Break

Tip: Hide the page header and page footer bands.

To create a title page for your tabular report:
- select the report header band
- choose Format > Table > Page Break
Automating the Opening of Reports

- You can create a shortcut on your desktop to open a report
- You can create a button in your data model to open a report

To create a shortcut on your desktop:
- in Windows Explorer, browse to the folder where the report is stored. This will usually be the Reports folder under the data model folder.
- click the report that you want to create a shortcut to
- on the File menu, click Create Shortcut
- drag or copy the shortcut icon onto the desktop
- double-click the shortcut to open the report

To link a button to a BI/Query Report:
- in the Linkage section of the Create/Edit Button dialog box, choose BI/Query Reports from the pop-up on the left
- if your report is not listed in the edit box, click the Browse button to display a dialog box where you can select the report you want or type its path and name into the edit box on the right
- select refresh to ensure that when you click the button, the data in the report is refreshed
Using Special Fields in Labels

■ Use the Fields drop-down list in the Text Editor to:
  ➤ include the date/time the query was run
  ➤ modify the page number label

There are a number of special fields that can be used in labels throughout your report to enhance the appearance and to communicate your message more effectively. Some of the special fields are described below. These special fields can be used in existing or new labels.

**Creation Date**
The date the report was created. (It doesn’t change, even when you open the report at a later time.)

**Creation Time**
The time the report was created. (It doesn’t change, even when you open the report at a later time.)

**Current Time/Date**
The current time and date. It changes each time you open the report. You can format the way in which this data is inserted.

**Data Source Date**
The date a specific data source was created.

**Field**
A value from a view. In the Data Cell Selector dialog box, choose the view you want, then choose a member from each dimension. Otherwise, BI/Query Reports inserts the value from the first cell that meets the requirements.

**Field Name**
The coordinates of a value from a view. For example, in a crosstab, if you specify a value in Products for 1998, the special field displays "Products/1998".

**Filter Dimension**
The dimensions, if any, that are in the filter for the crosstab or chart you’re using. You need to specify the view you want.
## Special Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotspot Attribute</td>
<td>The attribute that users are requalifying when they click a hotspot. (Only available if a hotspot is selected.)</td>
</tr>
<tr>
<td>Hotspot Operator</td>
<td>The operator used in a hotspot. (Only available if a hotspot is selected.)</td>
</tr>
<tr>
<td>Hotspot Values</td>
<td>The values that appear in the requalified query. (Only available if a hotspot is selected.)</td>
</tr>
<tr>
<td>Page Number</td>
<td>The page number.</td>
</tr>
<tr>
<td>Prompt Value</td>
<td>The prompt value(s) used in the query. You need to specify the view you want, then confirm the prompt value.</td>
</tr>
<tr>
<td>Report Filename</td>
<td>The name of the report you’re working in.</td>
</tr>
<tr>
<td>Total Pages</td>
<td>The total number of pages in the report.</td>
</tr>
<tr>
<td>View Name</td>
<td>The name of a specific view. You need to specify the view you want.</td>
</tr>
<tr>
<td>X-axis Dimensions</td>
<td>The name of the dimensions on the horizontal axis of the crosstab or chart you’re using. You need to specify the view you want.</td>
</tr>
<tr>
<td>Y-axis Dimensions</td>
<td>The name of the dimensions on the vertical axis of the crosstab or chart you’re using. You need to specify the view you want.</td>
</tr>
</tbody>
</table>
Special Fields Example

- A text label containing the chart filter was added to this chart report

This text label contains the Filter Dimensions special fields. The text label changes as the chart filter is changed.

Sales Report for Territory = Europe

Special Field Example

12M
10M
8M
6M
4M
2M
0M

1997 1998 1999

SUM Order Amount
Chapter 6: Summary

- In this chapter you have learned how to:
  - add vertical lines to your report
  - use styles and backgrounds to provide a consistent look to tables and reports
  - use special fields to customize a report