A Guide to Aquator

9 Reporters

Version 4.2

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Aquator reporters

Introduction

An Aquator Reporter is a tool used to generate reports from with the Aquator program. Reporting tools are extensible and additional reporters can be added by third parties. The available reporting tools are accessible in two ways:

- from the Tools menu the Reporters sub-menu will show a list of available reporting tools; clicking on one of the available items on this sub-menu will run the chosen reporting tool

- the Reporter tool button on the toolbar beneath the menu bar will show the icon of the last-used reporting tool; clicking on this button will run this reporting tool again

Reporting tools may not be available as described because

- the tool depends on a third-party application which is not installed or has been uninstalled e.g. Microsoft Word

- the Reporter tool button has been hidden; go to the dialog raised by the Setup...Options menu command and select the Toolbar tab to modify which buttons are visible

General usage

When a reporting tool is executed it automatically generates a report. For example, a Microsoft Word report is generated by loading Microsoft Word and creating a document containing the report. The contents of the report are always the contents of the node or nodes in the project tree view that are selected for reporting.

The nodes whose contents will be reported are automatically selected in one of two ways:

- if check boxes are visible in the project tree view, and if one or more are checked (ticked), then all checked nodes are included in the report

- if check boxes are not visible, or no check box is ticked, then the currently selected node only is included in the report

To show or hide the tree view check boxes go to the dialog raised by the Setup...Options menu command, or click on the Options toolbar button, and select or deselect the option to show checkboxes.

You may find the report contains unexpected information if you have ticked a particular node but are currently viewing an unticked node when a report is generated. The ticked node, not the current node, is included in the report.

The information contained in each node is constructed dynamically. This is why each node included in the report momentarily appears on the screen as the report is being generated. This also serves to show you which nodes are being reported on.

Aquator has an Report "Wizard" which assists with reporting. It enables this sometimes complex task to accomplished via question and answers on a succession of simple screens. This is an alternative to using the Reporter directly and is available via the menu item "Tools – Report - Wizard".

Word Reporter

The Word Reporter generates a report in Microsoft Word format. It does this by automatically loading Microsoft Word and creating a new document if necessary, or optionally by adding the report to the end of any currently open document if it detects that Microsoft Word is already loaded.

The Word user interface will not show until the last node to be included in the report has been generated. This greatly increases the speed with which a report is generated. Word will *not* be closed automatically by Aquator. Rather the user should choose whether and where to save the document containing the report before closing Word manually.

There are no restrictions on the type of node that can generate information to go into a Word report. In particular graphical items are inserted as metafiles.

The menu item **Setup...Tools...Report...Word document** will display the following dialog where the options to control how a Word report is generated can be entered.

Setup Word Report Tool

Report
- ○ Just show me the report in Word
- ○ Save report in a file but don't run Word
- ● Save report in a file and run Word

Word
- ○ Create new instance of Word every time
- ● Use existing instance of Word if possible
  - ○ Create new document every time
  - ● Paste into current document if possible

File
- ○ Ask me for a new file name each time
- ● Construct a file name automatically

☐ Show this dialog every time

OK   Cancel

The *Report* box allows you to choose to

- show the report in Word without saving in a file
- save a Word (.DOC) format report without showing Word
- save in a file and show the report in Word

The *Word* box allows you to choose to

- run Word separately for every report
- or use any instance of Word already running if possible; in this case you can choose whether to create a new document each time or append to the currently open document

The *File* box allows you to choose to

- enter a new file name each time if you choose to save to file
- or construct new file names automatically

The last option controls whether this dialog is shown every time a Word report is created.
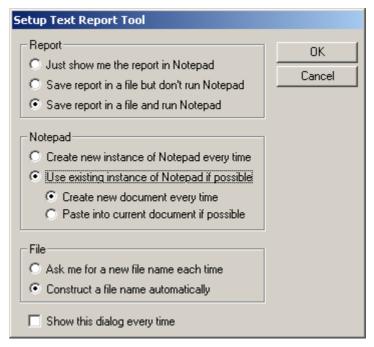
Text Reporter

The Text Reporter generates a report in ASCII text format. The report is written to a hidden temporary file and then loaded into Notepad.

The user interface of Notepad will not show until the last node to be included in the report has been generated. This greatly increases the speed with which a report is generated. Notepad will *not* be closed automatically by Aquator. Rather the user should choose whether and where to save the document containing the report before closing Notepad manually.

Text reports cannot contain graphical items e.g. the schematic. Only the heading of a node that represents a graphical item will be included.

The menu item **Setup...Tools...Report...Text document** will display the following dialog where the options to control how a text-format report is generated can be entered.

The *Report* box allows you to choose to

- show the report in Noteapd without saving in a file
- save a text (.TXT) format report without showing Notepad
- save in a file and show the report in Notepad

The *Notepad* box allows you to choose to

- run Notepad separately for every report
- or use any instance of Notepad already running if possible; in this case you can choose whether to create a new document each time or append to the currently open document (this option may not work on some systems whete Notepad cannot be controlled in this way)

The *File* box allows you to choose to

- enter a new file name each time if you choose to save to file
- or construct new file names automatically

The last option controls whether this dialog is shown every time a text report is created.
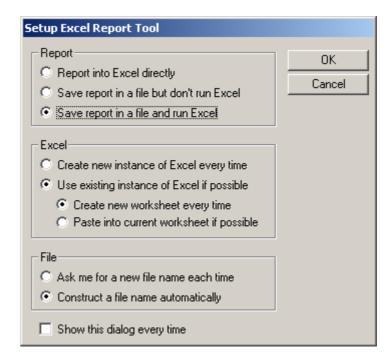
Excel Reporter

The Excel Reporter generates a report in Microsoft Excel format. It does this by automatically loading Microsoft Excel and creating a new document if necessary, or by adding the report to the end of any currently open document if it detects that Microsoft Excel is already loaded.

The Excel user interface will not show until the last node to be included in the report has been generated. This greatly increases the speed with which a report is generated. Excel will *not* be closed automatically by Aquator. Rather the user should choose whether and where to save the document containing the report before closing Word manually.

There are no restrictions on the type of node that can generate information to go into an Excel report but tables are particularly suitable because of the ease of formatting tables in Excel and because there are virtually no width restrictions on the table.

The menu item **Setup...Tools...Report...Excel spreadsheet** will display the following dialog where the options to control how an Excel report is generated can be entered.

Setup Excel Report Tool

Report
- ○ Report into Excel directly
- ○ Save report in a file but don't run Excel
- ◉ Save report in a file and run Excel

Excel
- ○ Create new instance of Excel every time
- ◉ Use existing instance of Excel if possible
  - ◉ Create new worksheet every time
  - ○ Paste into current worksheet if possible

File
- ○ Ask me for a new file name each time
- ◉ Construct a file name automatically

☐ Show this dialog every time

[OK] [Cancel]

The *Report* box allows you to choose to

- show the report in Excel without saving in a file
- save an Excel (.XLS) format report without showing Excel
- save in a file and show the report in Excel

The *Excel* box allows you to choose to

- run Excel separately for every report
- or use any instance of Excel already running if possible; in this case you can choose whether to create a new document each time or append to the currently open document

The *File* box allows you to choose to

- enter a new file name each time if you choose to save to file
- or construct new file names automatically

The last option controls whether this dialog is shown every time an Excel report is created.