Excel reports builder for Creatio

Setup Guide

Add Excel reports to a workplace

To have an easy access to reports management section, you need to add it to one of your workplaces:

- Go to System designer > Workplace setup. Open a workplace that is usually used by your system administrators.
- Go to Workplace setup tab > Sections. Add section named 'Excel reports' to the workplace.
- Logout from the system and login again. You will need access the workplace to see the section you've just added.

Add new report

- Click 'New report'.
- Specify your report name, report type and choose Creatio object that has the data you need to be exported in the report.
- To work with the list of reports you can set up columns in Excel report section. I.e., go to View > Select fields to display, and choose Name and Source table fields to see the list of your templates together with the objects they are associated with.

Setup the columns in the report

- Open the report you would like to setup.
- Go to Settings tab > Columns setup. Here you can choose a list of columns from the report source object (or any related object) to be exported.

Setup filters in the report

- A possibility to setup pre-defined filters is only available for reports of 'Custom report' type.
- To filter the data for reports of 'Section report' type you can use standard filter tools of the corresponding section.

Setup an Excel template file

To easily get beautiful formatted Excel report with all the formulas, diagrams you need you can use your Excel file as a template for report export.

- Create your Excel template file. You should leave the page named as in the 'Sheet name' parameter of an excel spreadsheet blank - exported data will be added there (with columns in the order you've set up as described at the step 'Setup the columns in the report'). You can use this columns order to refer to data while building formulas and graphs on other pages of your spreadsheet.
- Open the report.
- Click 'Upload template' and choose the template you've created.
- Make sure that the flag 'Template uploaded' on the report page has switched to 'true'.

Export data using your template

- **'Section report' type**: Go to the section specified in the report > apply section filters > go to 'EXCEL REPORTS' menu (near 'VIEW' menu) and generate a selected report.

- **'Edit page report' type**: Go to the section specified in the report > open the record > go to 'EXCEL REPORTS' menu (near 'VIEW' menu) and generate a selected report.

- **'Custom report' type**: Go to 'Excel reports' section > open the report > press 'GENERATE REPORT' button.
- Pay attention! To keep all the references working properly in your resulting export file, you need to name the resulting Excel file with the report the same as an initial template file. Alternatively, you can fix reference issues after export in Excel.