

# UNIT-e

Capita Business Services Ltd.

Capita F&HE

## [UNIT-E XML REPORTING LITE]

UNIT-e XML Reporting Lite is an application for reporting against XML data sources. The tool provides users with a simple user interface to create browser based reports for display locally or on a web site.

## Table of Contents

<b>TABLE OF CONTENTS</b> .....	<b>2</b>
<b>INTRODUCTION</b> .....	<b>4</b>
HOW IT WORKS .....	4
<b>INSTALLATION</b> .....	<b>4</b>
PREREQUISITES.....	4
<b>GETTING STARTED WITH HTML</b> .....	<b>4</b>
<b>CUSTOM LAYOUTS</b> .....	<b>8</b>
DOCUMENT .....	8
Change Output Format .....	8
Parameters.....	8
XML .....	8
For HTML output:.....	9
Change Header/Footer .....	9
Set Title .....	9
Change CSS.....	9
For Excel output:.....	9
Change Style.....	9
TABLE CONTENT .....	9
Filter .....	9
Sort.....	9
Heading .....	10
Indent .....	10
ShowColumnHeadings .....	10
ShowHeading .....	10
InsertBlankRow .....	10
TableHeadingStyle .....	10
ColSpan .....	10
CSS Class.....	10
DisplayStyle .....	10
StartOnNewRow .....	11
ELEMENT CONTENT.....	11
CSS Class.....	11

Heading .....	11
ELEMENT RIGHT CLICK .....	11
Promote Element .....	11
Demote Element .....	11
Add Parent Field.....	11
Remove Parent Field.....	11
<b>WORKING WITH EXCEL.....</b>	<b>12</b>

## Introduction

UNIT-e XML Reporting Lite is an application for reporting against XML data sources. The tool provides users with a simple user interface to create browser based reports for display locally or on a web site. Alternatively, data may be exported into Microsoft Excel for use in spreadsheet format.

Reports are created using a simple tree view based interface from which users simply click on a check box to include or exclude which elements they want to appear in their report. Despite this simplicity quite complex layouts can still be achieved with support of nested tables, inline and "InColumn" layouts. Look and feel can be highly customised via support for cascading style sheets, headers and footers, sorting and parameterised filters.

The end results can be viewed in the stand alone viewer (included), hosted on a website or imported via either into Microsoft Excel for further processing. Optionally the data may be imported directly into Excel without initially displaying in a browser.

## How it works

When a report designer selects fields and options in the UNIT-e XML Reporting Lite application the information is used to build up an XML Stylesheet file (XSL or XSLT). This file can then be used by the report viewer to transform the source XML into HTML for viewing in a browser or to an XML Excel 2003 file for viewing in Excel.

## Installation

UNIT-e XML Reporting Lite is supplied as two files, setup.exe & UNIT-e XML Reporting Lite.msi. To install the application on a local machine run the setup.exe application and follow the on screen prompts.

## Prerequisites

UNIT-e XML Reporting Lite requires Microsoft .NET Framework 2.0. To view Excel files Excel 2003 or 2007 is required. Excel 2007 is recommended for large XML files.

## Getting Started

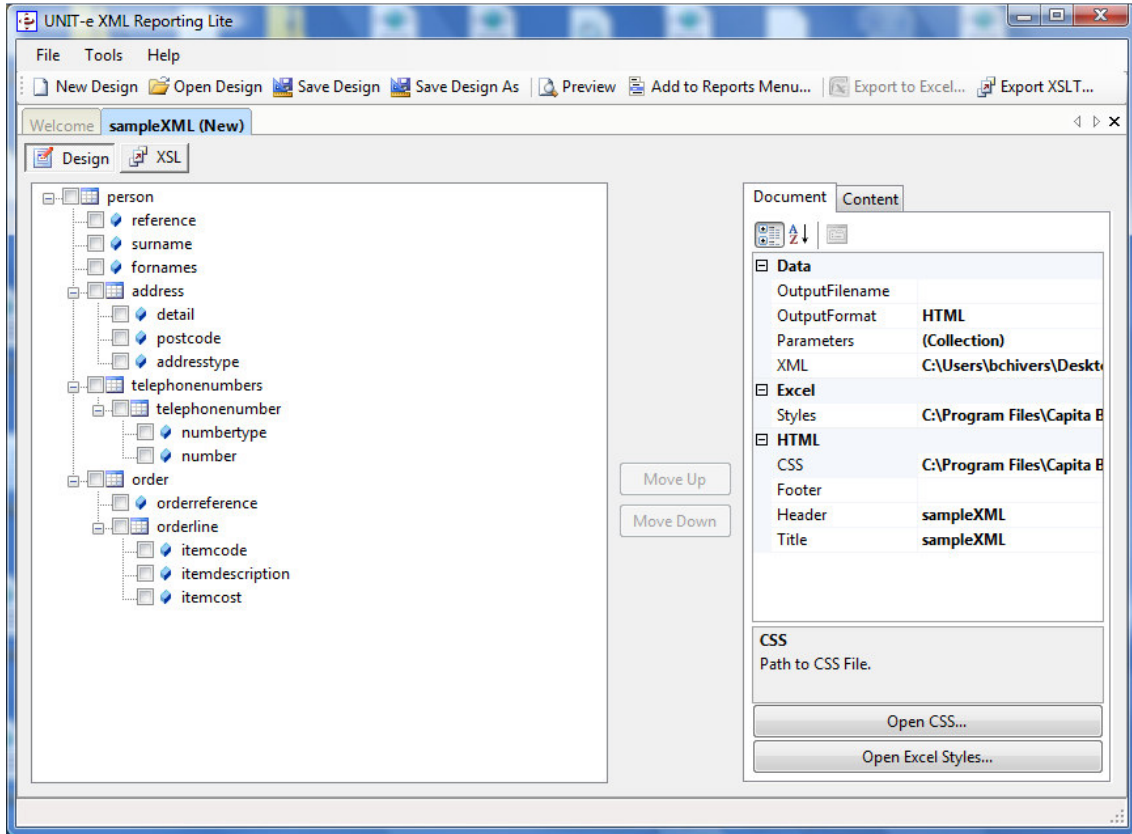
Once the application is installed a new section is added to your start up menu labelled UNIT-e which hosts two applications;

- UNIT-e XML Reporting Lite
  - The tool for design and viewing of reports.
- UNIT-e XML Reporting Lite View
  - Viewing reports only.

To get started click on UNIT-e XML Reporting Lite and the screen below will be displayed.

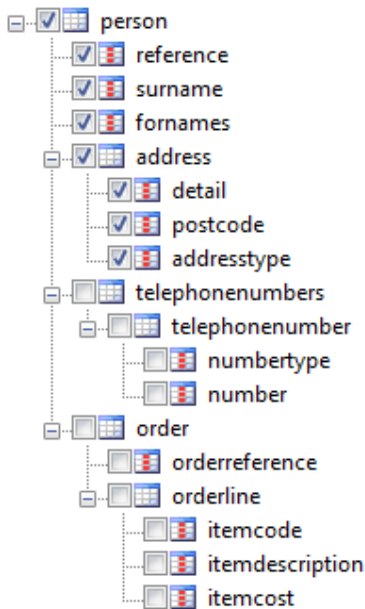


To create a basic report click on New Design and select an XML file as your data source. An example file demoxml.xml is included in the Samples folder with the application folder (C:\Program Files\Capita Business Services Ltd\UNIT-e XML Reporting Lite\Samples). The software will pause briefly while the XML is retrieved and a new tab will open as below.



The view consists of a tree view on the left with nodes representing elements and child elements within the XML. On the right is a tab control with property grids for detailed configuration.

To create a basic report check a number of boxes in the tree view as shown below.



Then click on the Preview button in the toolbar a basic report is shown as below.

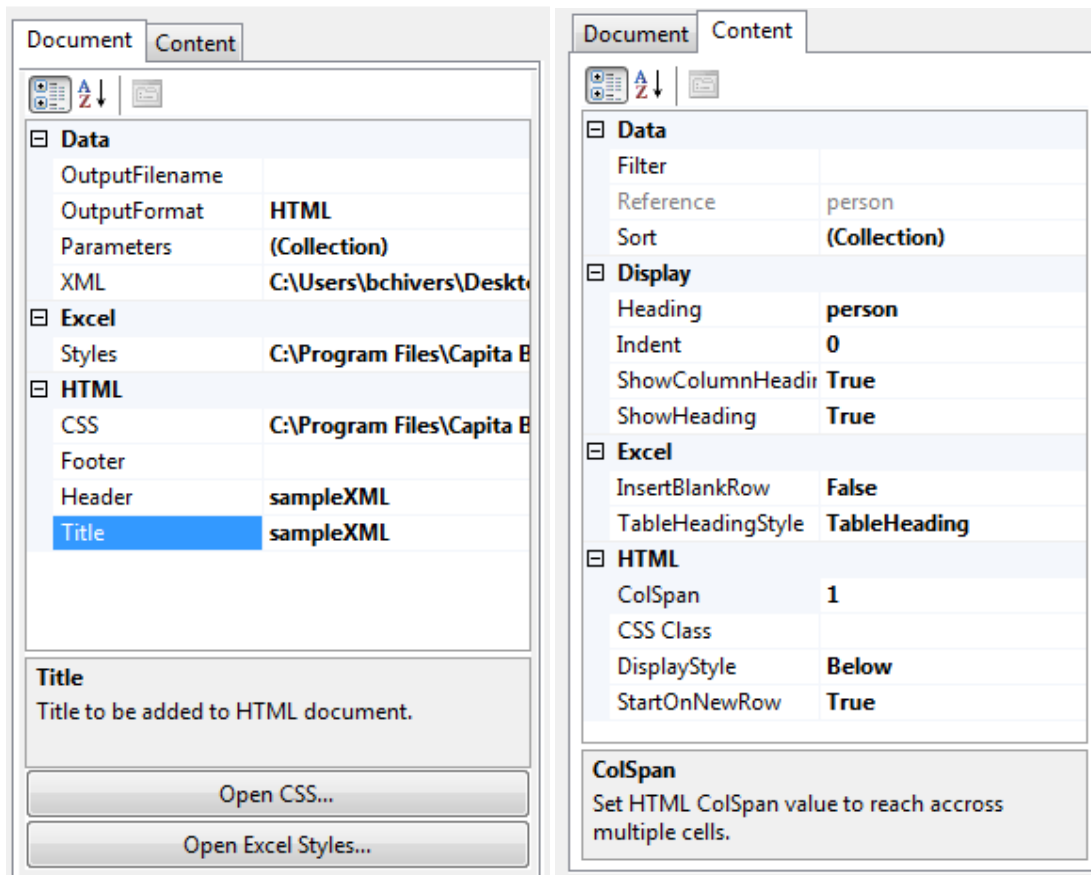
## sampleXML

person			
reference	surname	fornames	
P1	Smith	Fred	
address			
	detail	postcode	addresstype
	1 High Street, Leeds	LS1 8IO	home
P2	Kelly	Mark	
address			
	detail	postcode	addresstype
	102 London Road, Bristol	BS3 8IO	home

Produced using UNIT-e software from Capita Business Services Ltd

This is the most basic output but we can now improve the layout by changing a couple of settings. Click on the **[Design]** button to move back to the design mode. On the right is a tab control with two tabs;

- Document
  - Change CSS reference
  - Set headers and footers
  - Create parameters
- Content
  - Allows you to change the heading for a column or table
  - Hide headers
  - Change CSS class reference
  - Map filters
  - Sort data



## Custom Layouts

### Document

Document level changes are made on the document tab.

### Change Output Format

Select the OutputFormat property in the property grid and select either HTML or Excel from the dropdown list.

### Parameters

Parameters allow values to be passed into a report at run time to filter the data. When a Report is run in either Excel or HTML mode the user is presented with a basic Parameters screen. Note parameters must be mapped to fields or tables using the Filter properties. Parameter syntax is not as sophisticated as that supported by UNIT-e search forms.

### XML

This is the source file used for preview. This location can be change but should only be exchanged for one with the same schema.

## **For HTML output:**

### **Change Header/Footer**

Select the Header/Footer property in the property grid and enter your preferred value.

### **Set Title**

Select the Title property in the property grid and set the preferred value. The Title appears in the <head> section of the output HTML and is used to label the Browser/Tab.

### **Change CSS**

Cascading style sheets are used to configure the report display. A default style sheet included in the install is automatically selected but this can be overridden by your own choice.

## **For Excel output:**

### **Change Style**

A default style included in the install is automatically selected but this can be overridden by your own choice.

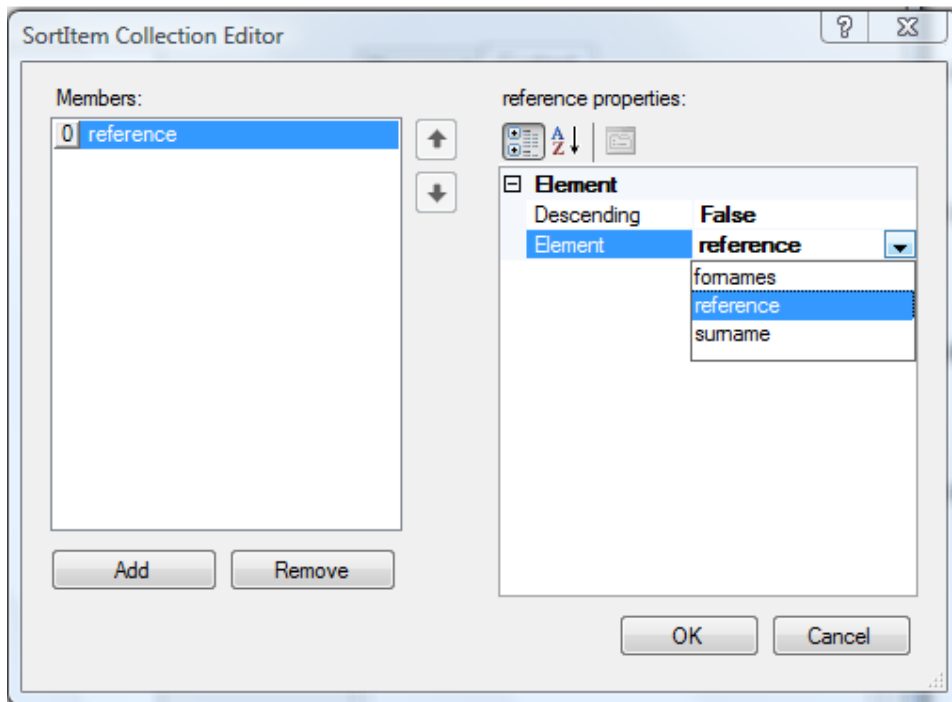
## **Table Content**

### **Filter**

Allows you to filter the output from the table using a literal value or parameter.

### **Sort**

Sort allows you to sort data in the output. Select the Sort property in the property grid and click on the drill button. This opens to Sort collection editor. Click on add and a new sort element is added. Select the field to sort by from the Element drop down. By default the order is ascending but this can be set the descending with the Descending property.



### Heading

Used to replace the default table heading taken from the source XML.

### Indent

Allows you to index a nested report by “x” columns in the parent report. Only used where DisplayStyle is set to “Below”.

### ShowColumnHeadings

Shows the column headings in the output, otherwise these are hidden.

### ShowHeading

Show a heading for the Table.

### InsertBlankRow

Set to True to insert a blank row between each instance of the table

### TableHeadingStyle

Sets the style for the table heading

### ColSpan

Allows you to stretch a nested report across multiple columns in the host report. Only used where DisplayStyle is set to “Below”.

### CSS Class

Allows you to specify a specific class to map to table to in cascading style sheet.

### DisplayStyle

The UNIT-e XML Report Designer supports multiple layouts for nested tables. By default sub reports are displayed below the report. Other options are InColumn which embeds the sub report within a

column of the parent report. Inline adds extra columns to the parent report and includes the output in there. The last option only works where a single child can be guaranteed.

### StartOnNewRow

Where a Table has more than one nested table you can display them side by side by setting StartOnNewRow to false for the latter report.

### Element Content

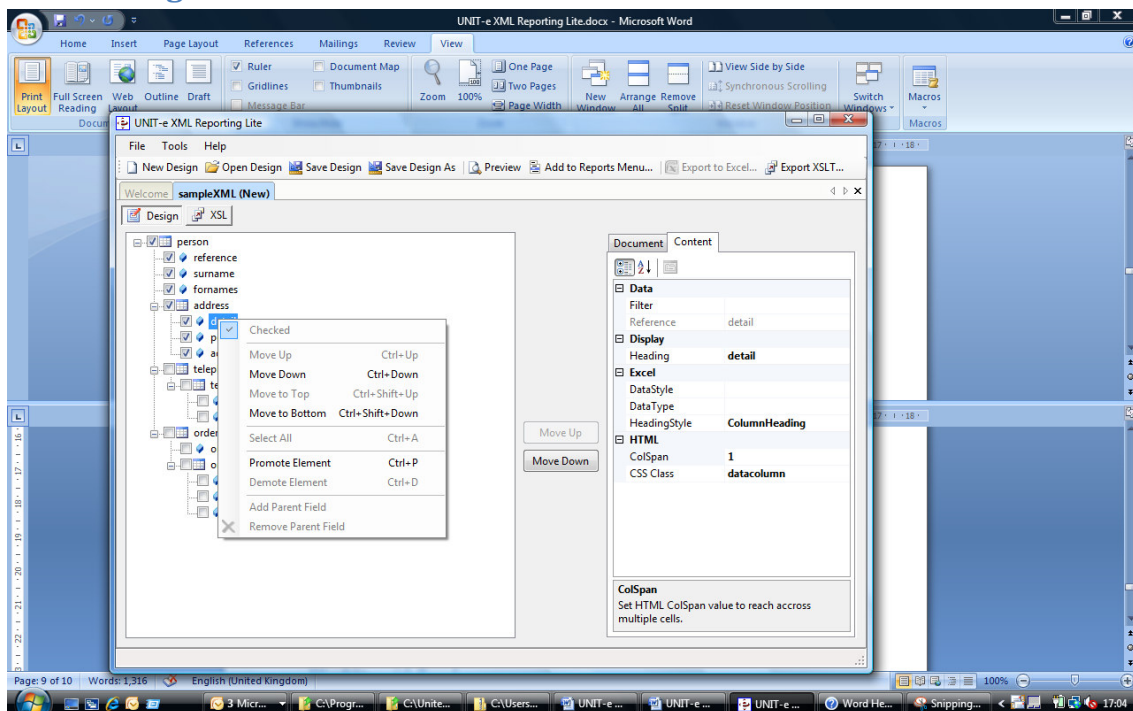
#### CSS Class

Allows you to specify a specific class to map to table headers/cells in the cascading style sheet.

#### Heading

Used to replace the default column heading taken from the source XML.

### Element Right Click



#### Promote Element

Allows an element to be displayed with the properties in the parent table

#### Demote Element

Allows a property that has been previously promoted to be returned to its own table

#### Add Parent Field

Allows a property from the parent table to be displayed alongside properties in the sub-table

#### Remove Parent Field

Removes the property from the parent table

## **Working with Excel**

XSLT can also be used to create Excel compatible XML files. To create a file for Excel follow you must set the OutputFormat in the Document tab to Excel. The layout is more limited than with HTML e.g. nested tables must always appear beneath their parents and/or siblings and cannot be displayed to the side. However you can use the “Add Parent Field” function to display properties in the parent table in columns alongside properties of the sibling table. Full support for Excel styles is available to control other aspects of the layout such as fonts, colours and size.

Apart from additional spreadsheet functionality, Excel is also useful for viewing XML files which would be too large to be manageable in an HTML environment.

## **File Menu**

**New Design – create a new design**

**Open Design - open up a previously design (UNIT-e Style Sheet \*.usi)**

**Save Design – save new design or changes to existing design**

**Save Design As – save design as a new UNIT-e Style Sheet (\*.usi)**

**Save All – save multiple designs**

**Export XSLT - export the XSLT script**

**Export to Excel – export data from an HTML report into Microsoft Excel**

**Exit – exit application**

## **Tools Menu**

**Data Grid – open a pre-defined grid (XML)**

**Preview – view output**

**Add to Reports Menu – add the report (\*.xsl) to the report menu for use with UNIT-e XML Reporting Lite View.**

**Open Reports Folder – open folder containing saved reports.**

## **Help Menu**

**UNIT-e XML Reporting Lite PDF – pdf version of this document to follow.**

**About – version details.**

