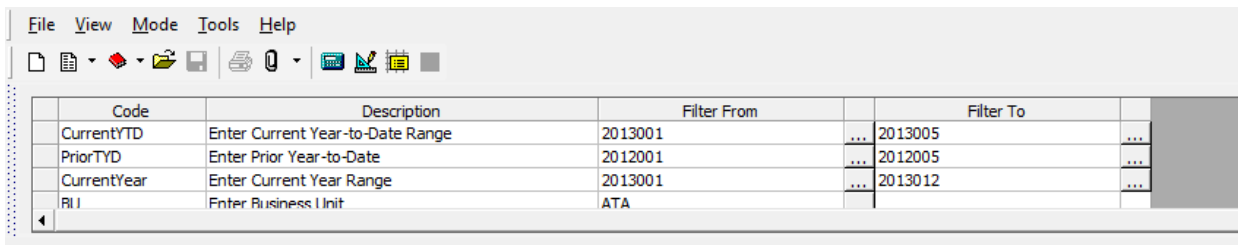**SunPlus**

Q&A Executive Training

Printing Reports from Executive

The printing functionality of QA Executive is worth the effort, especially for reports that need to be run once a month. For ad hoc reports created as a routine matter, exporting them to Excel and printing them from Excel works just fine. But for a routine report being run by someone not familiar with the software and not technically savvy, when you want to leave instructions like "Run the report, change these prompts, then run it, print it, and pass it out", it is worthwhile to set up Executive's printing functionality.
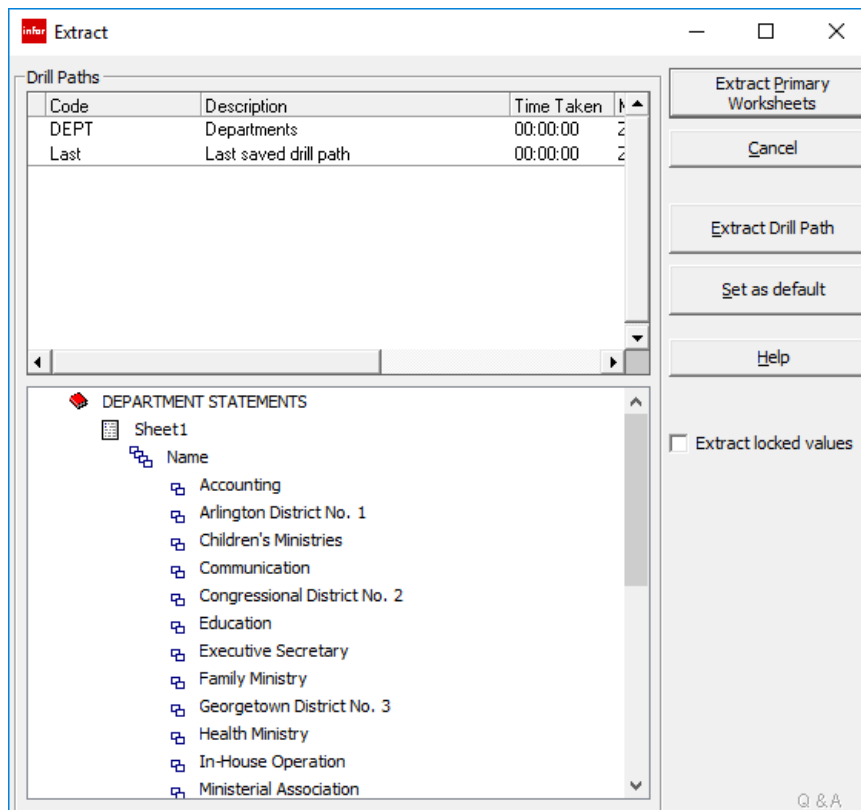
Also, you need to learn how to modify the printing functionality if there are problems with the financial statements. For example, if when you are printing the financial statements, you decide you need to change a margin or the paper size or add a logo, or something of that sort, this document will help.

- Open the Departmental Statements created earlier
- Set the prompts to
  - CurrentYTD   2013001 to 2013005
  - PriorTYD   2012001 to 2012005
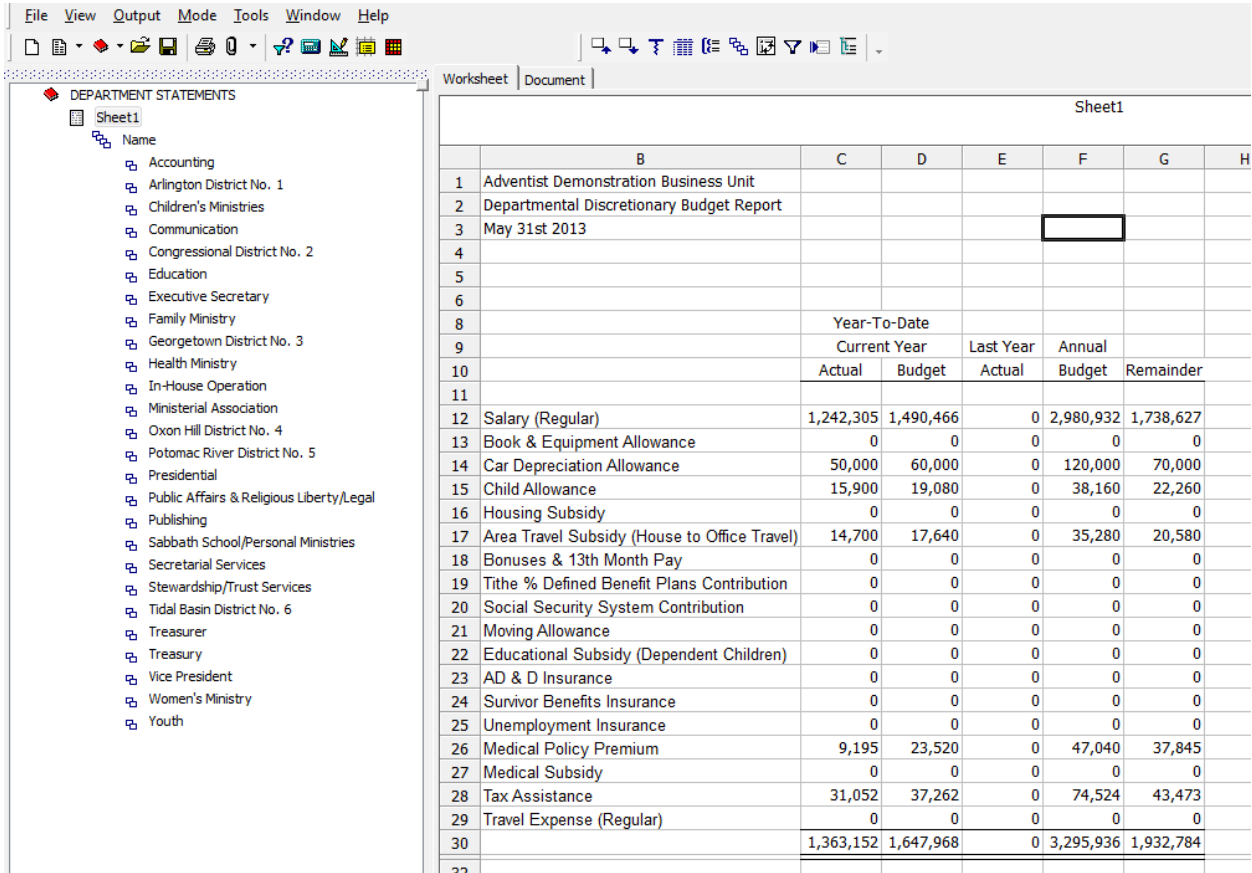 - CurrentYear   2013001 to 2013012
  - BU   ATA

Code	Description	Filter From		Filter To	
CurrentYTD	Enter Current Year-to-Date Range	2013001	...	2013005	...
PriorTYD	Enter Prior Year-to-Date	2012001	...	2012005	...
CurrentYear	Enter Current Year Range	2013001	...	2013012	...
BU	Enter Business Unit	ATA			

- Click the Extract (calculate) icon

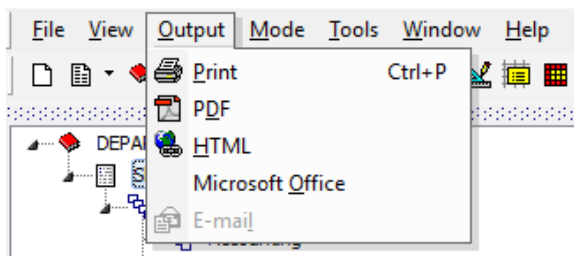- Click the Extract Drill Path

Now to print the report.

Output Menu

Important: When setting up printing details, you must be in the Extract mode.
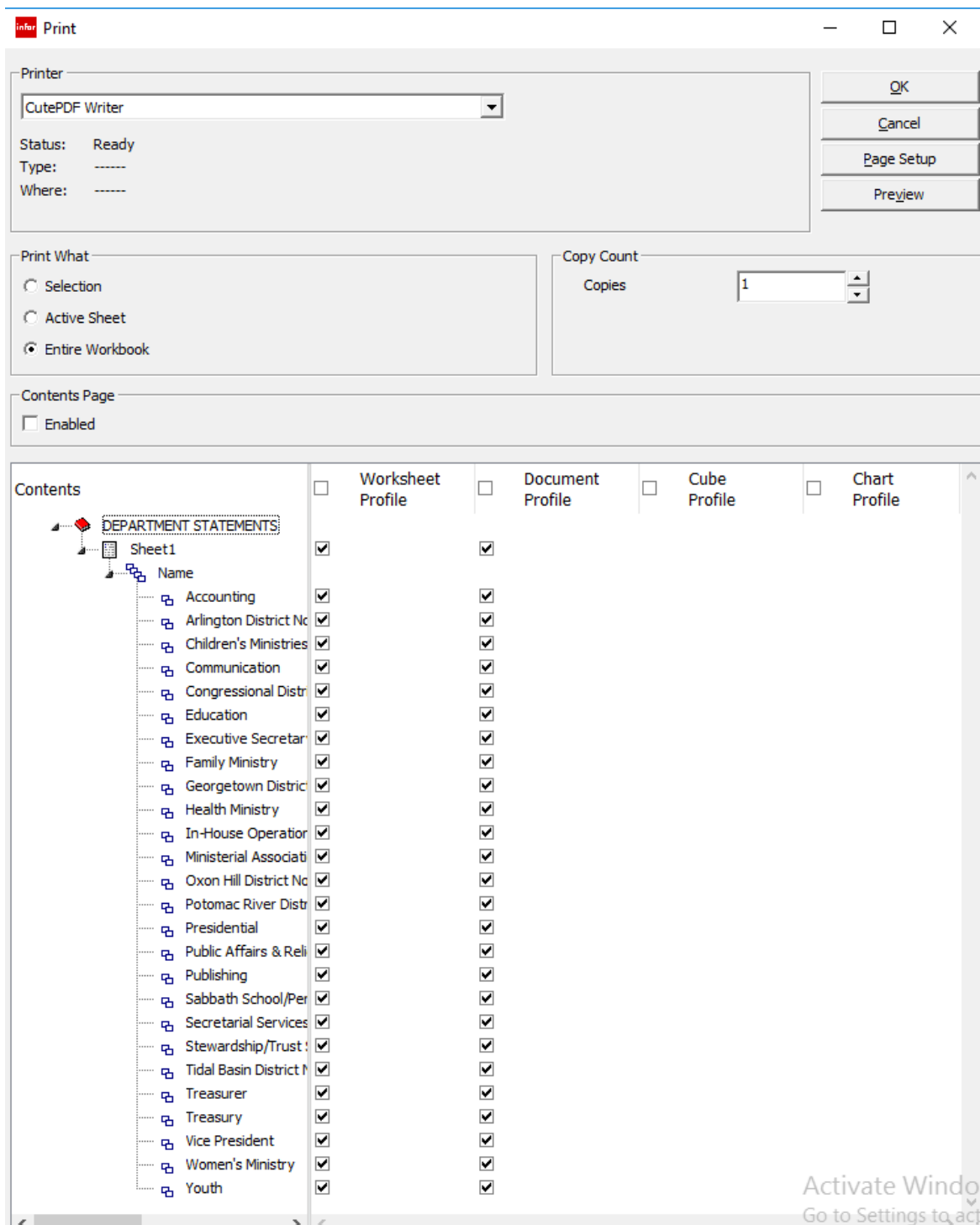
The Output menu options are:

- Print
- PDF
- HTML
- Microsoft Office

The same formatting or print controls operate both Print and.PDF functionality.

- Select Print

- Click the Preview button to see the results if the report were printed with these setup details.
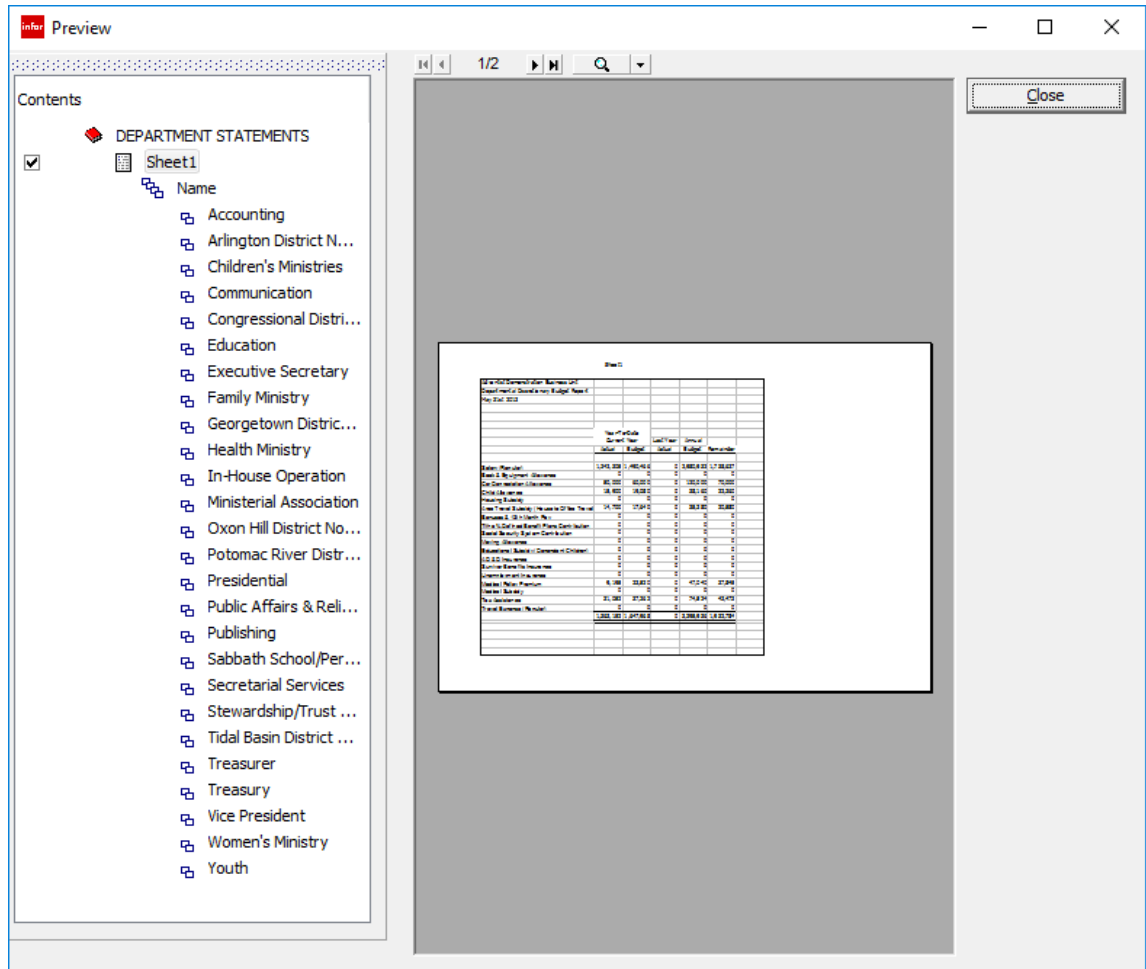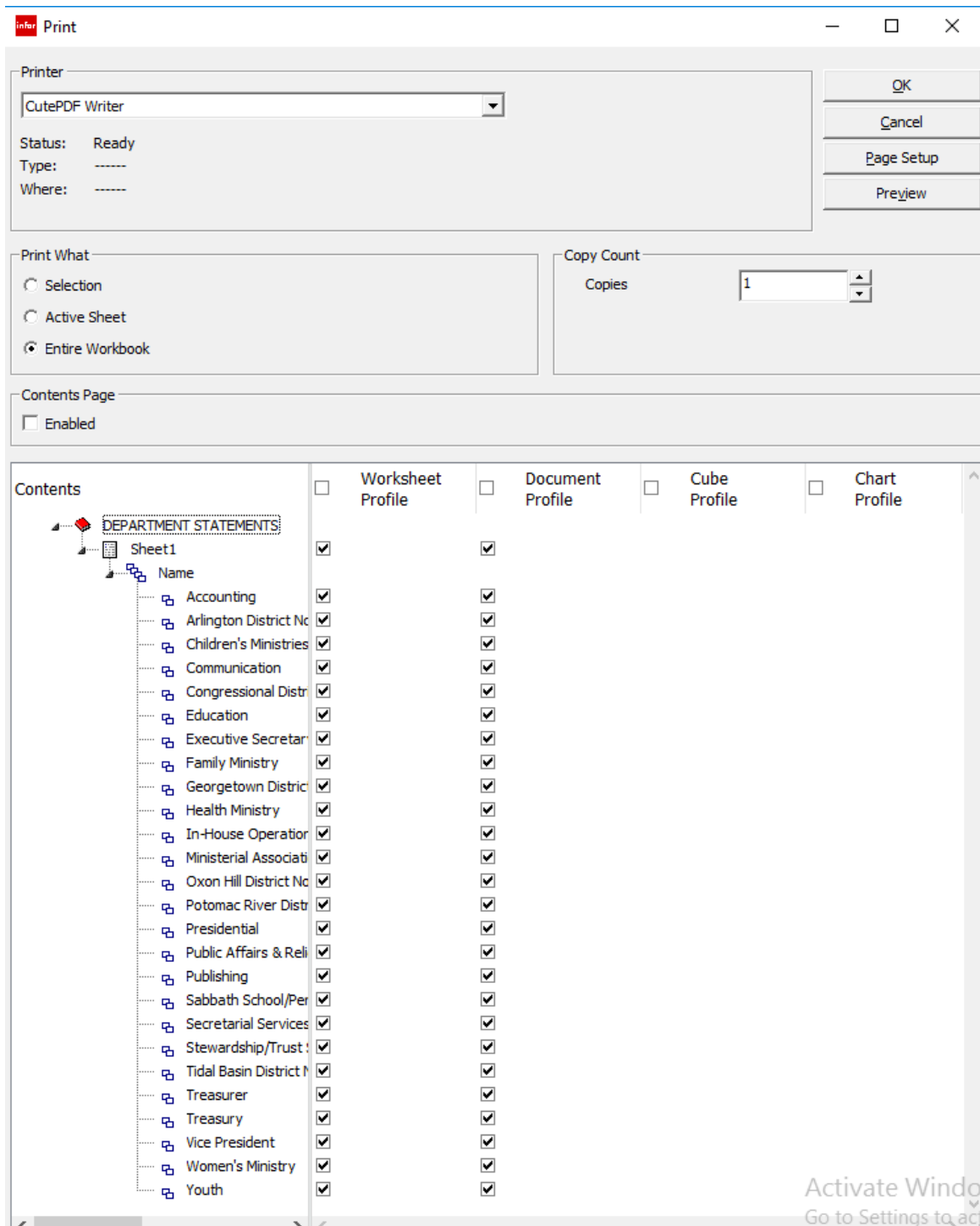
The Preview shows how the Summary sheet would print out. It includes:
- The grids
- The bold outline of the page and
- The header.
- Also, this sheet would print over two pages (the second page would be blank)

Click Close to close the Preview.
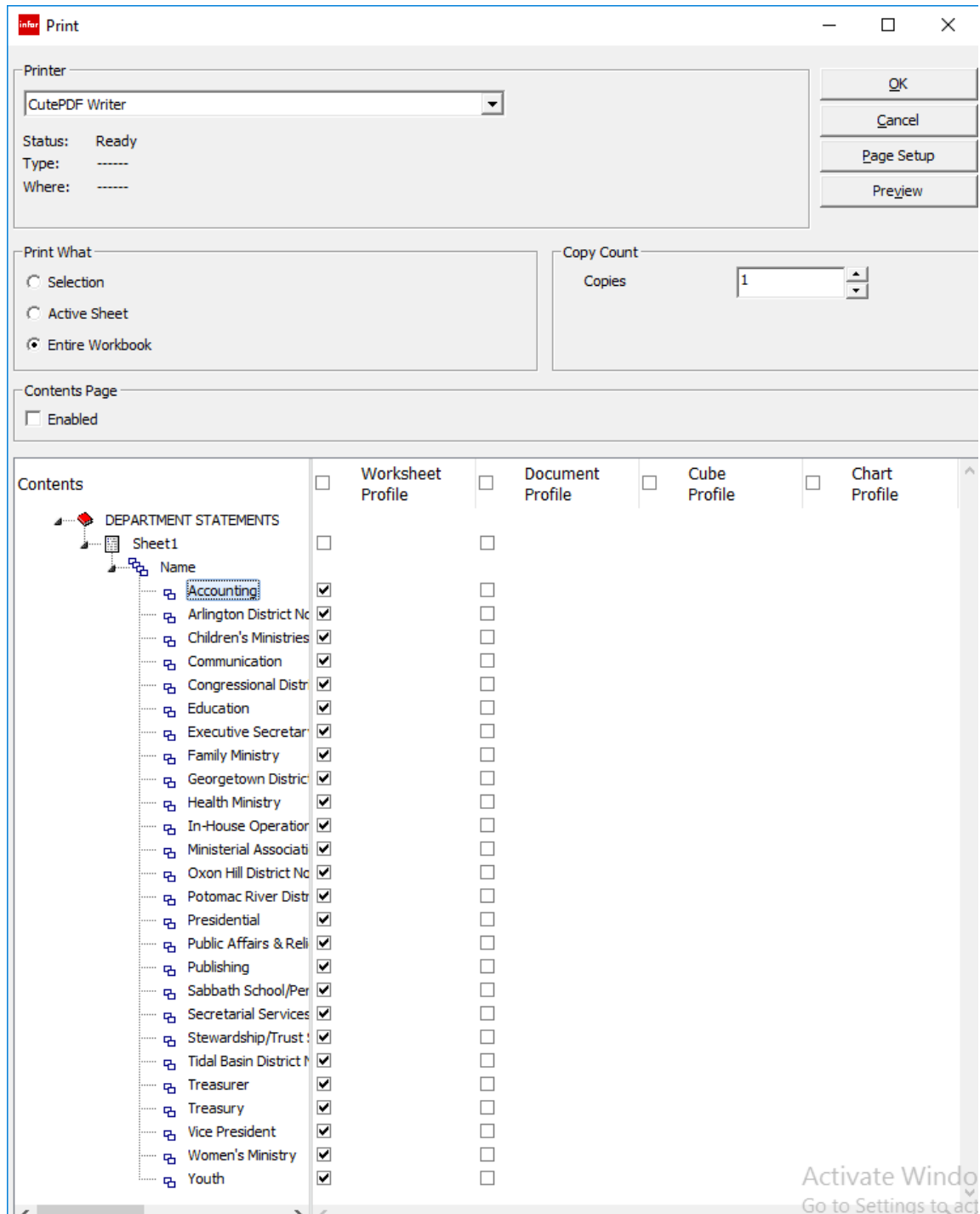
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Print Screen Contents

The Print interface is shown below:

It helps to expand the Contents pane at the left side of the lower pane. Expand by dragging the right margin to the right. In that pane, are the titles of breakout pages.

SunPlus

In the Worksheet Profile and the Document Profile columns in the pane at the lower right, there are checkmarks next to each sheet in the report. The checkmarks mean that sheet will be included in the printout. To leave a page out of the printout, uncheck the related checkbox.

Profiles

In the above screenshot, the Sheet1 Worksheet Profile has been unchecked. Also, all the Document Profile sheets have been unchecked by clicking once in the Document Profile check box on the header row.
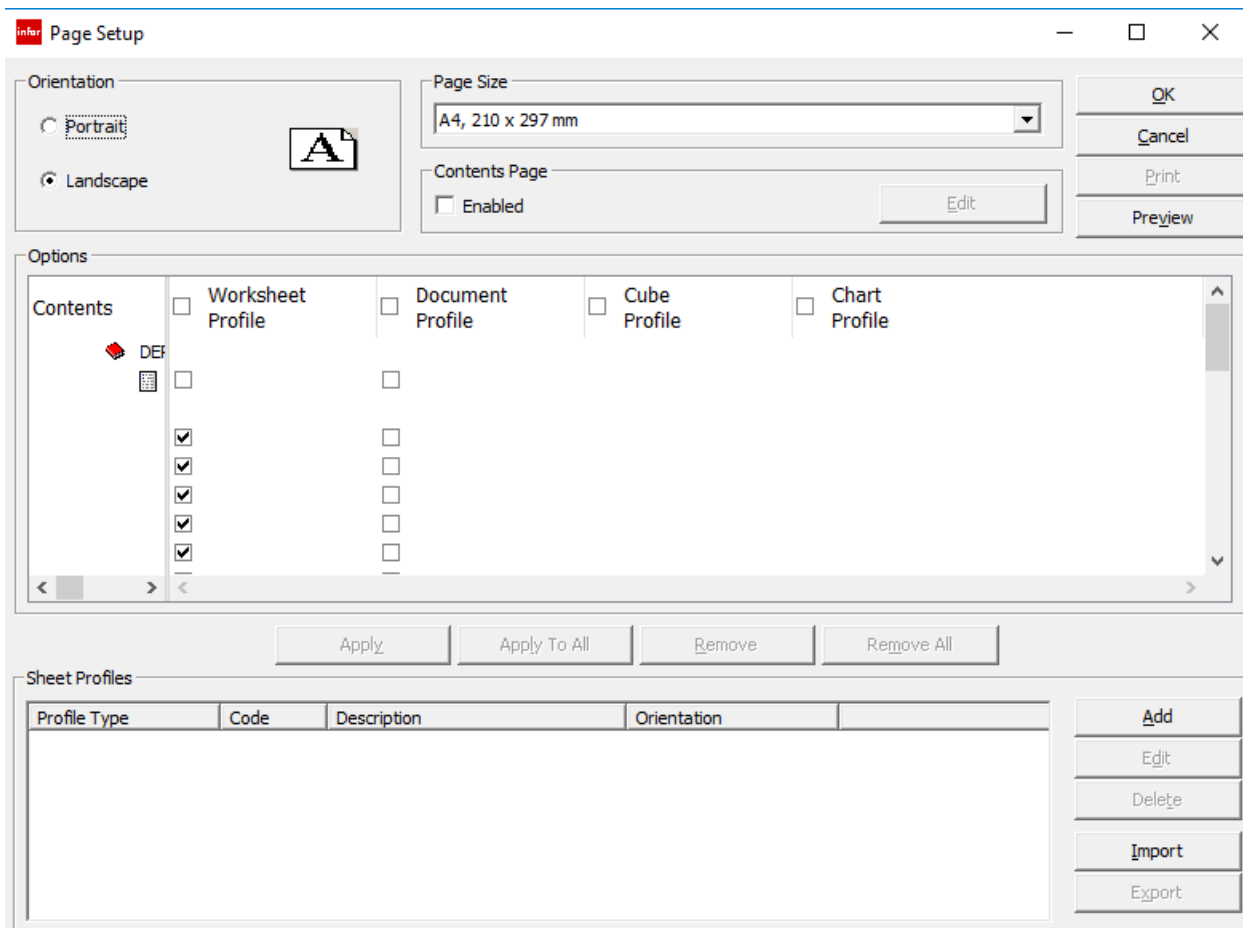
At this point, the Print setup is ready to go. It is still not suitable, but it is slightly better.

In the Copy Count portion of the interface, select the number of copies to print.

Click the third button from the top to select Page Setup.

- Click Page Setup

Page Setup

Page Setup controls general details for all report pages.

In the upper left portion, select a general orientation for the report pages:
- Portrait or
- Landscape

Select paper size in the field in the top middle portion of the dialogue box and enable a Contents page.

What is a Contents page? A Contents Page is a page at the beginning of the report and explains all other pages. If Contents Page is enabled, the content of that page can be edited. Many people think the Contents Page is a waste of paper; however, try it once to see what you think.

A Worksheet Profile can be defined for each of the report's pages. Set up a separate profile for each page if each page should be formatted differently. The pros and cons of setting up separate profiles for each page of a report will be discussed later.
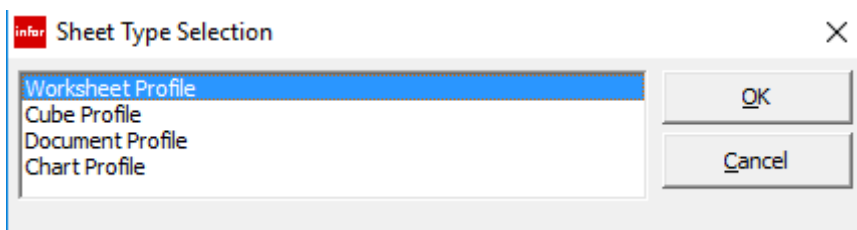
A complex report may have two or three profiles.

One page may have 8 to 10 columns but just a few rows. It is a short and stubby page. A Landscape orientation with custom margins would be the best presentation. A profile with those configurations could be created applied to that page.
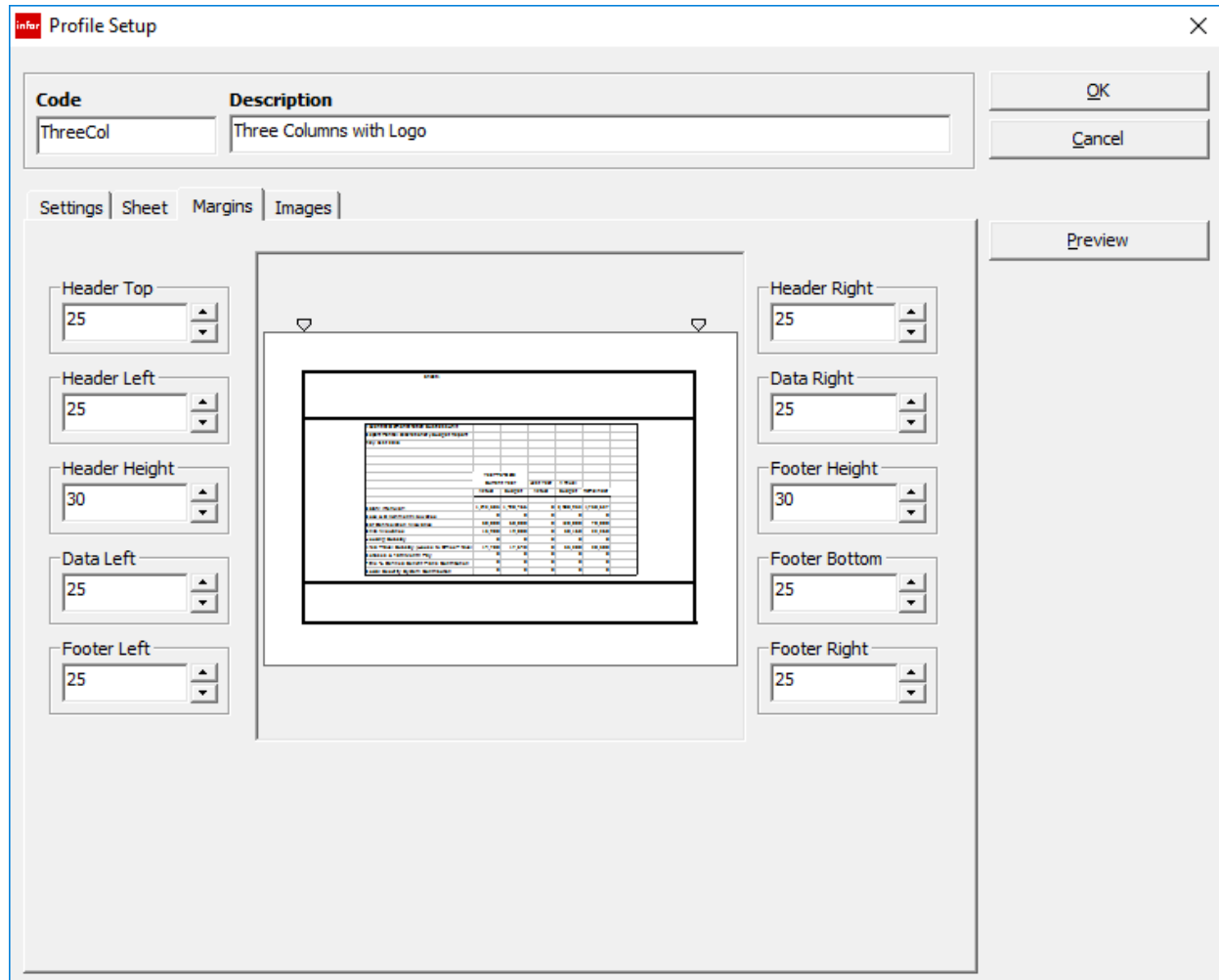
Another page in the same report may have 4 columns and many rows. A Portrait orientation would be better for that page. A second profile could be created and applied to page.

For our example, let's add a profile to be assigned to any pages we want. Our general report sheet is about four or five columns wide and twenty to thirty rows long. Our profile will fit that configuration. We will only build a single profile.

- Click Add in the Page Setup interface

- Select Worksheet Profile from the Sheet Type Selection list
- Click OK

Profile Setup

This is fairly intuitive.

- First, give the new profile a name in the Code field
    - A Code can consist of anything but spaces.
    - We'll call the demonstration Code ThreeCol
- Enter a Description of the profile in the Description field
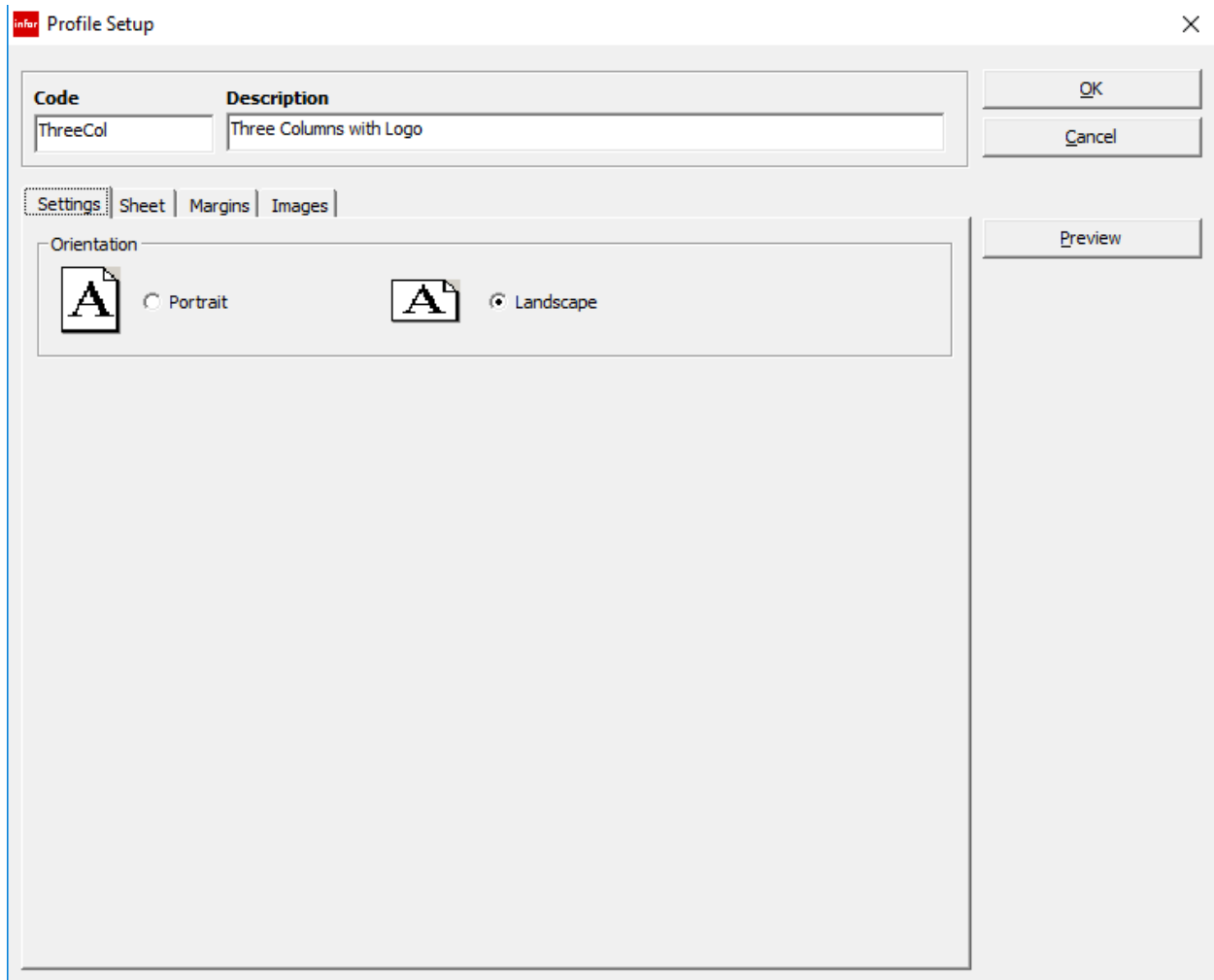   - The demonstration profile Description will be Three Columns with Logo

This interface has four tabs:
- Settings
- Sheet
- Margins
- Images

The Margin tab is particularly useful. Fields on this tab set the size and width of the header, which can be different from the width of the main body of the report.

The dialogue has a dragging feature, so the various margins can be dragged to wherever needed.

Settings
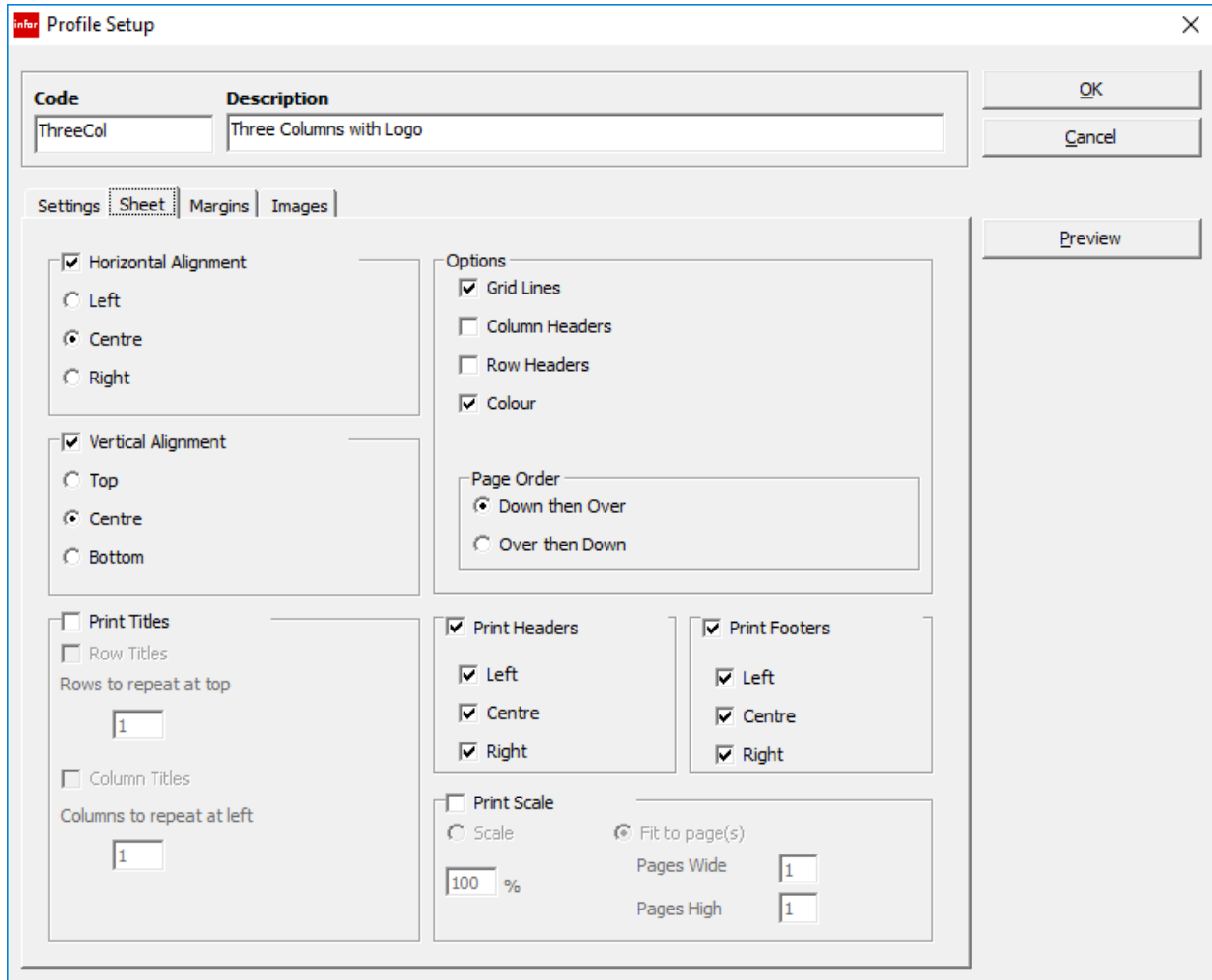
Orientation can be set per page, if necessary.

![SunPlus logo]

Sheet

Special features of the Sheet Tab:

- Set data alignment
- Print/don't print titles
- Set/Remove grid lines
- Print to scale
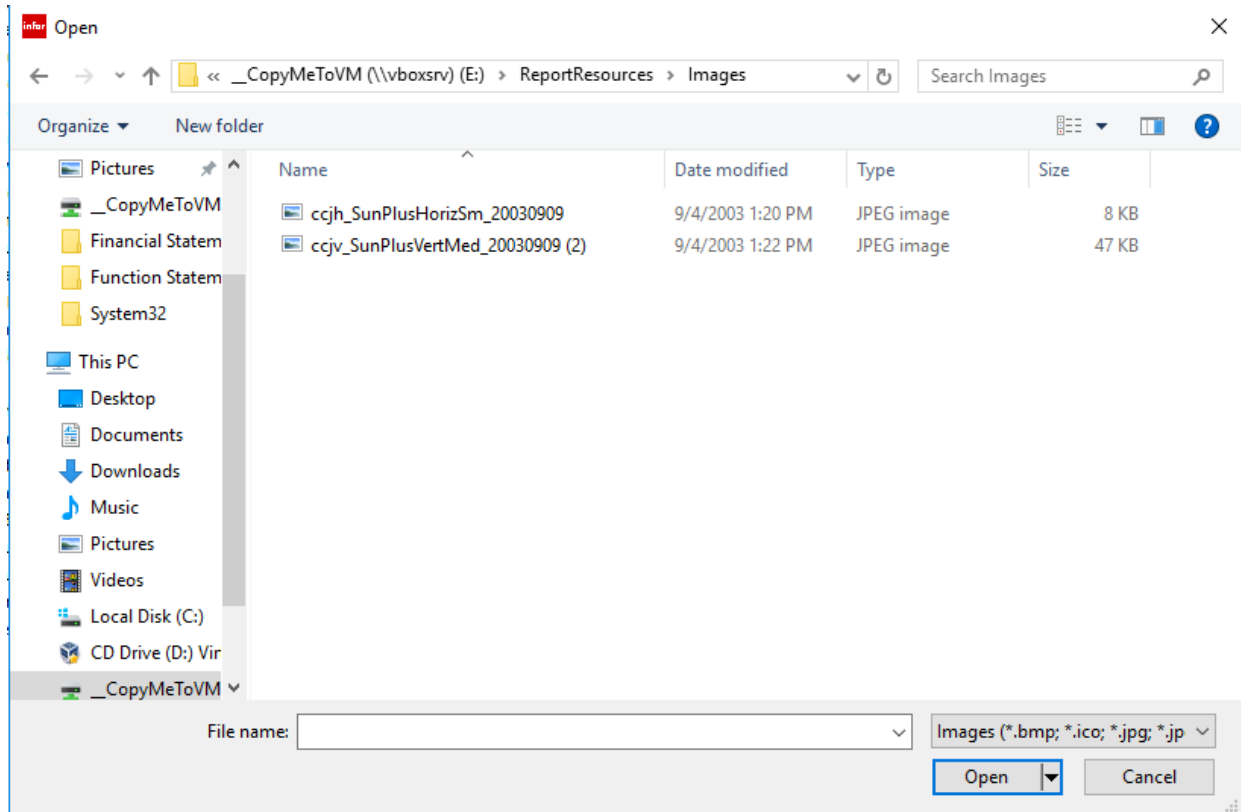
SunPlus
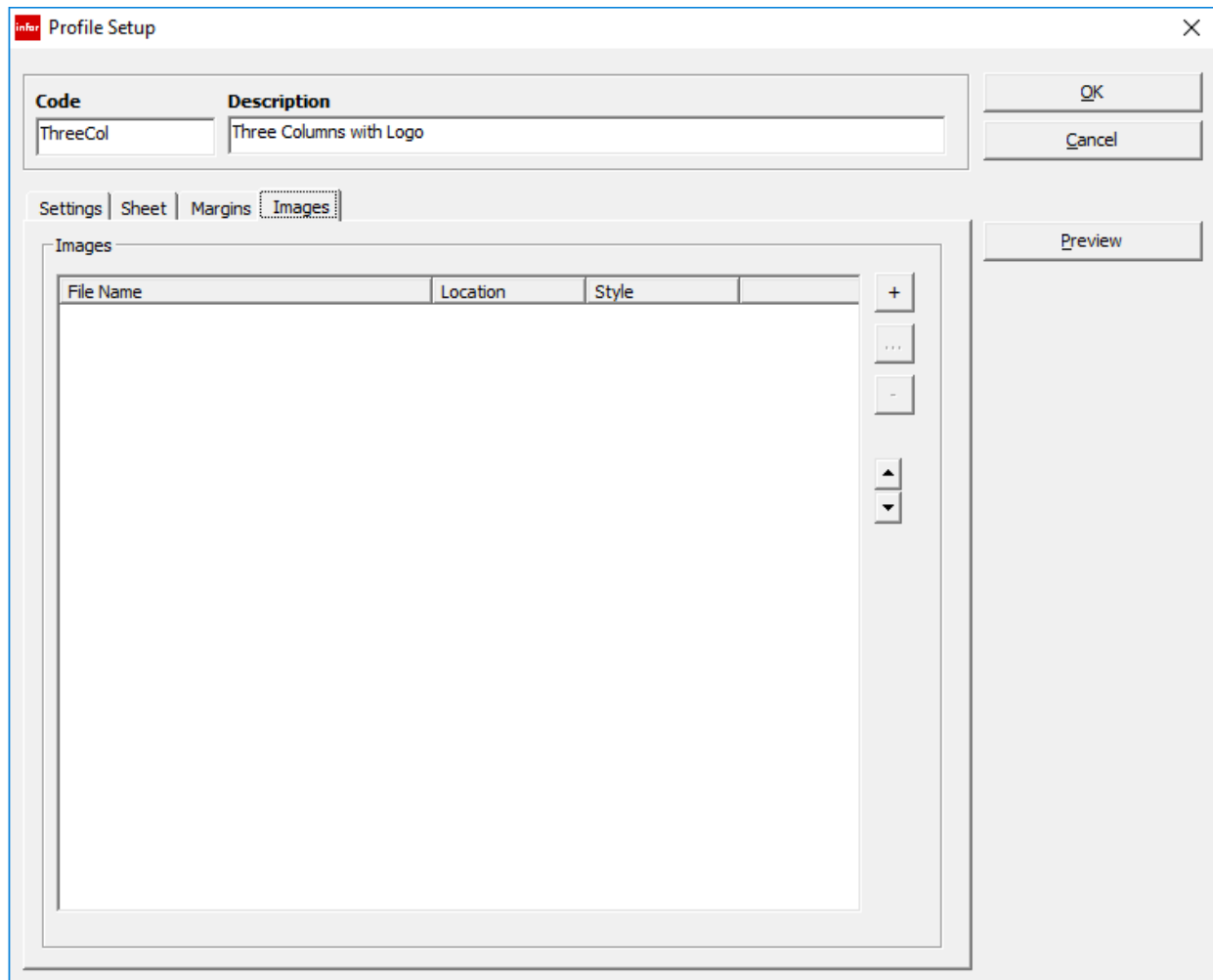
Images

Use the Images Tab to add images to the report. This is basically a warehouse of images that can be made available for all Executive reports.

To add an image:
- Click the + icon at the top right of the Images pane

![SunPlus]

Image Setup ✕

Image

[   ] [...]   [OK]
[Cancel]

Location
- ○ Header   ○ Footer
- ● Body   ○ Page

Alignment
☑ Horizontal   ☑ Vertical
- ○ Left   ○ Top
- ● Centre   ● Centre
- ○ Right   ○ Bottom

Stretch
- ● No Change
- ○ Tile
- ○ Stretch

Margins
Left [3] ▲▼   Right [3] ▲▼
Top [3] ▲▼   Bottom [3] ▲▼

- Click the Assist button [...] for the Image field

Images ✕

File Name	Format	Count

[Add]   [OK]
[Edit]   [Cancel]
[Remove]

☐ Fit to Window

![SunPlus logo]

- Click the Add button

- Browse through the computer's directory to find the image file
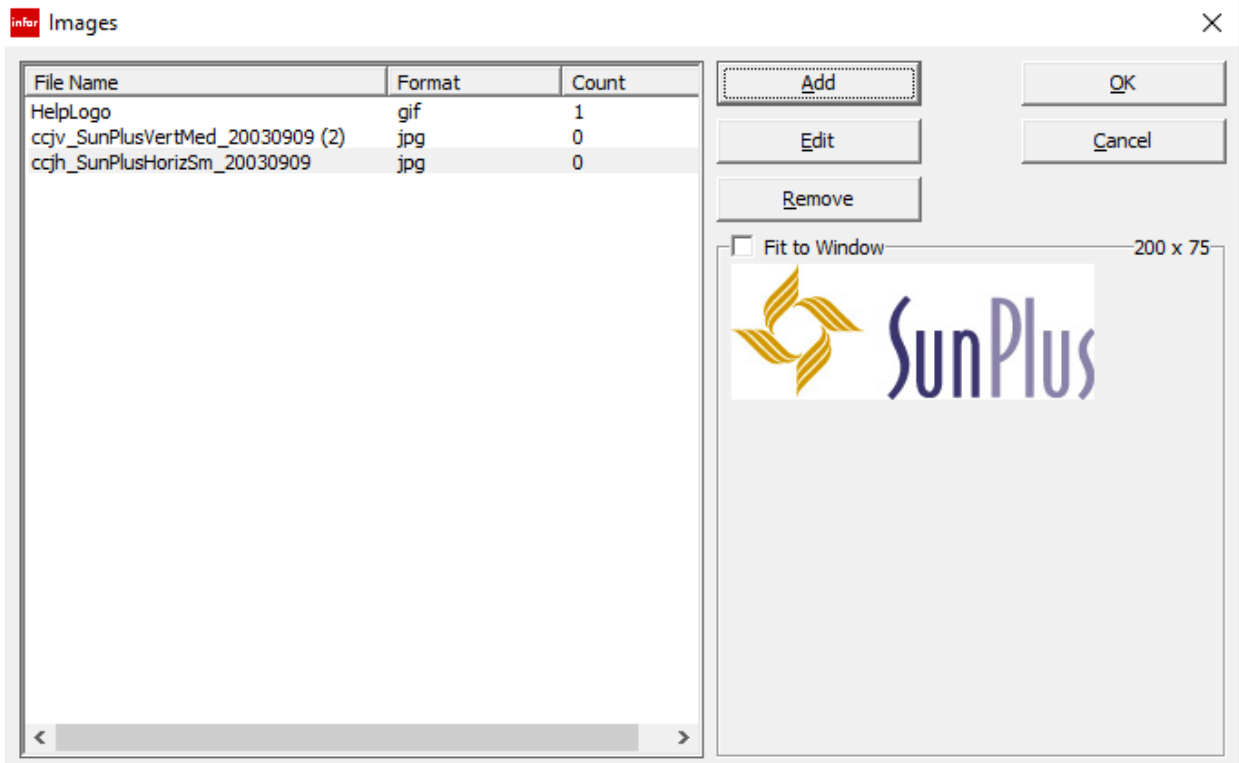
- Click OK
- Once the image file has been added to the warehouse, it can be placed anywhere in the report

Image Setup ☒

Image

ccjh_SunPlusHorizSm_20030909.jpg   `...`

OK

Cancel

Location
- ⦿ Header
- ○ Body
- ○ Footer
- ○ Page

Alignment

☑ Horizontal
- ⦿ Left
- ○ Centre
- ○ Right

☑ Vertical
- ○ Top
- ⦿ Centre
- ○ Bottom

Stretch
- ⦿ No Change
- ○ Tile
- ○ Stretch

Margins

Left	3	Right	3
Top	3	Bottom	3

- When returned to the Page Setup interface, select the worksheet to which the Profile will apply

- In the screenshot above, the first Worksheet in the Worksheet Profile column has been selected
  - The "ThreeCol" code is displayed by the first checkbox in the column
- Click Apply
- Click the Preview button, to see the image has been added to the specified location in the worksheet

In an actual report environment, it is a good idea to apply the same profile to all worksheets, so their formatting is similar.

One of the arguments for using the same profile for all worksheets in a report, is if there is a problem, necessary changes can be easily made in one place, and apply to the entire report.
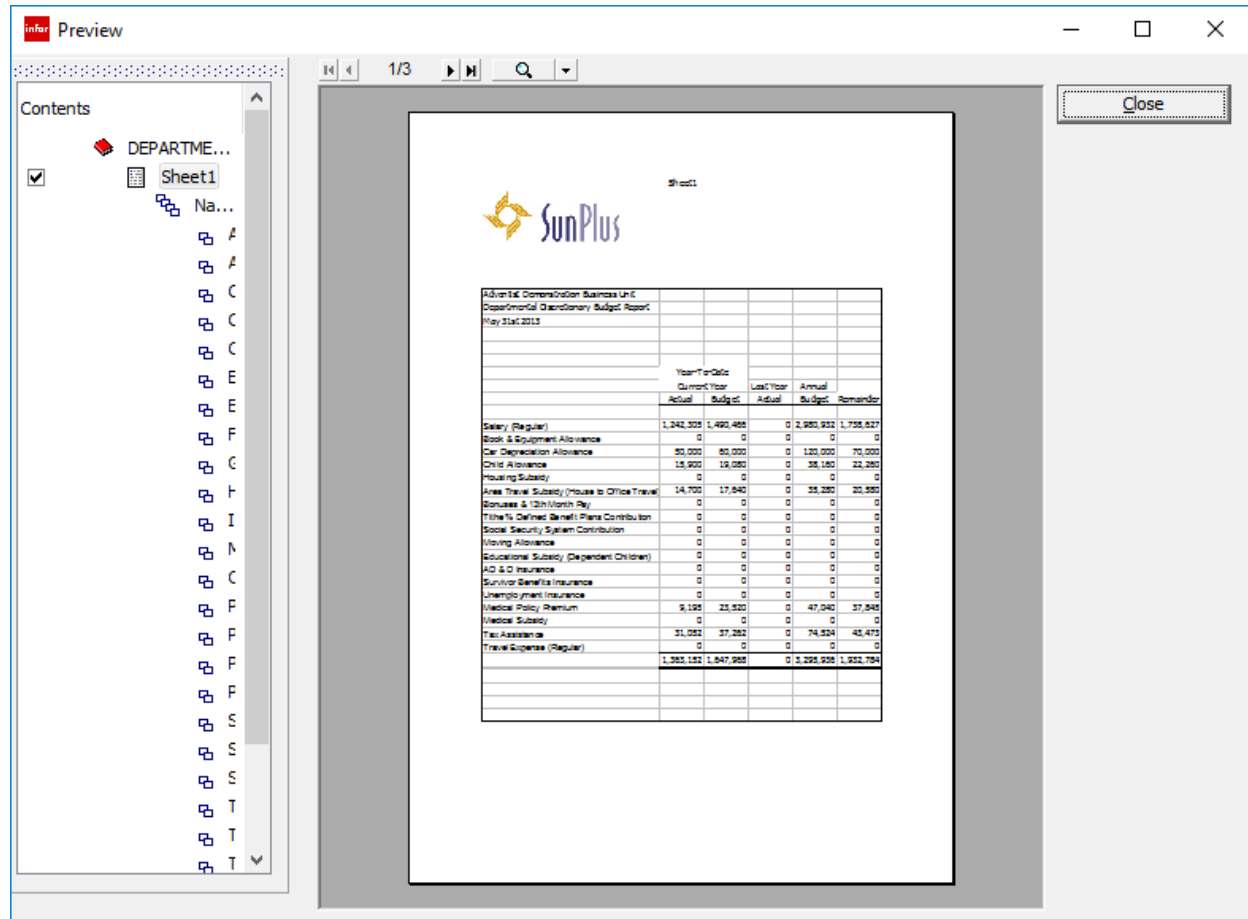
Also, on the Page Setup interface, notice at the stack of buttons in the lower right-side corner.
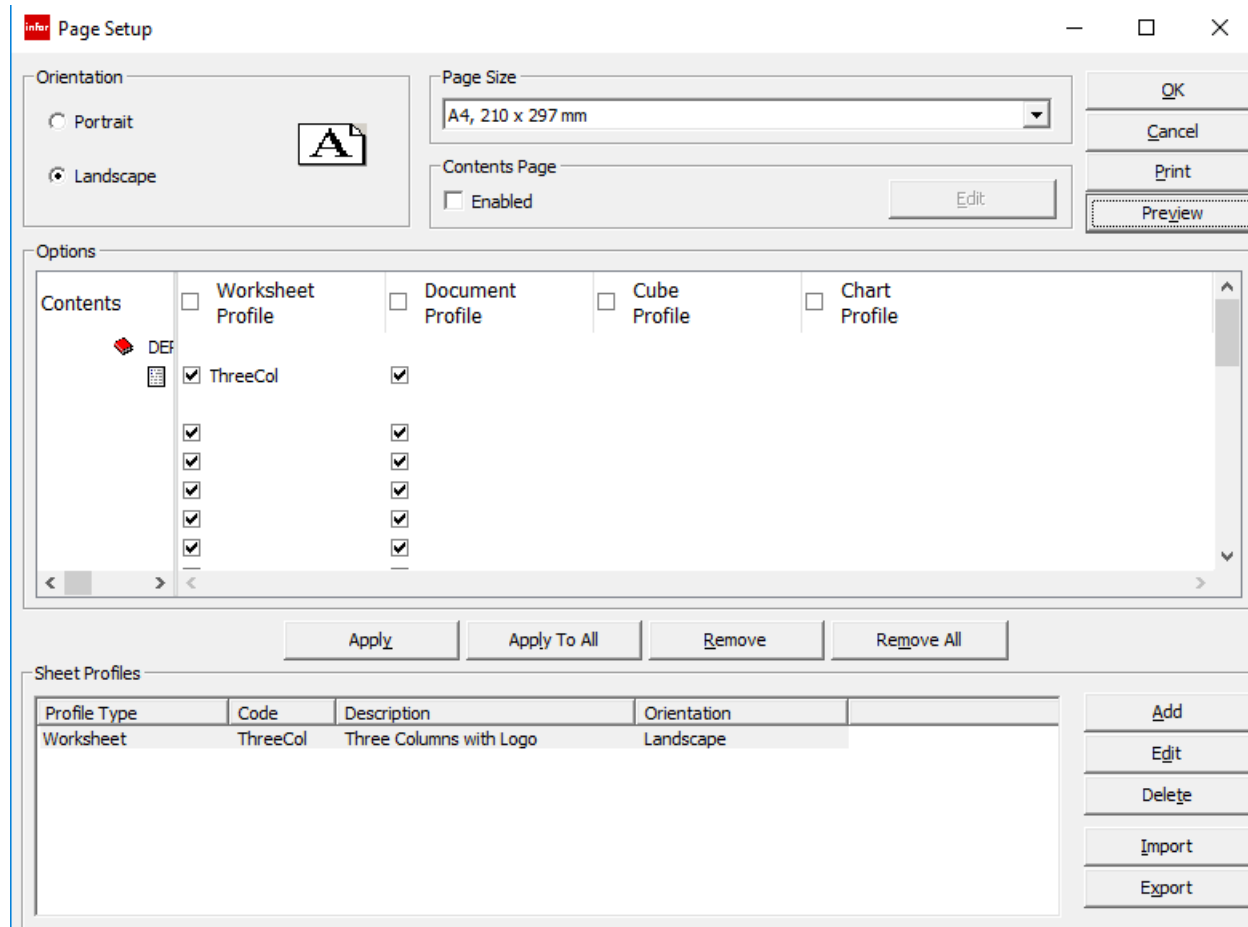
Notice the Import and Export buttons.

For example, a series of Profiles has been created, intended to cover the needs of the organization's usual reports. They were created using the Add function, as discussed above. Then, they are all added to each report, using the Import and Export buttons.

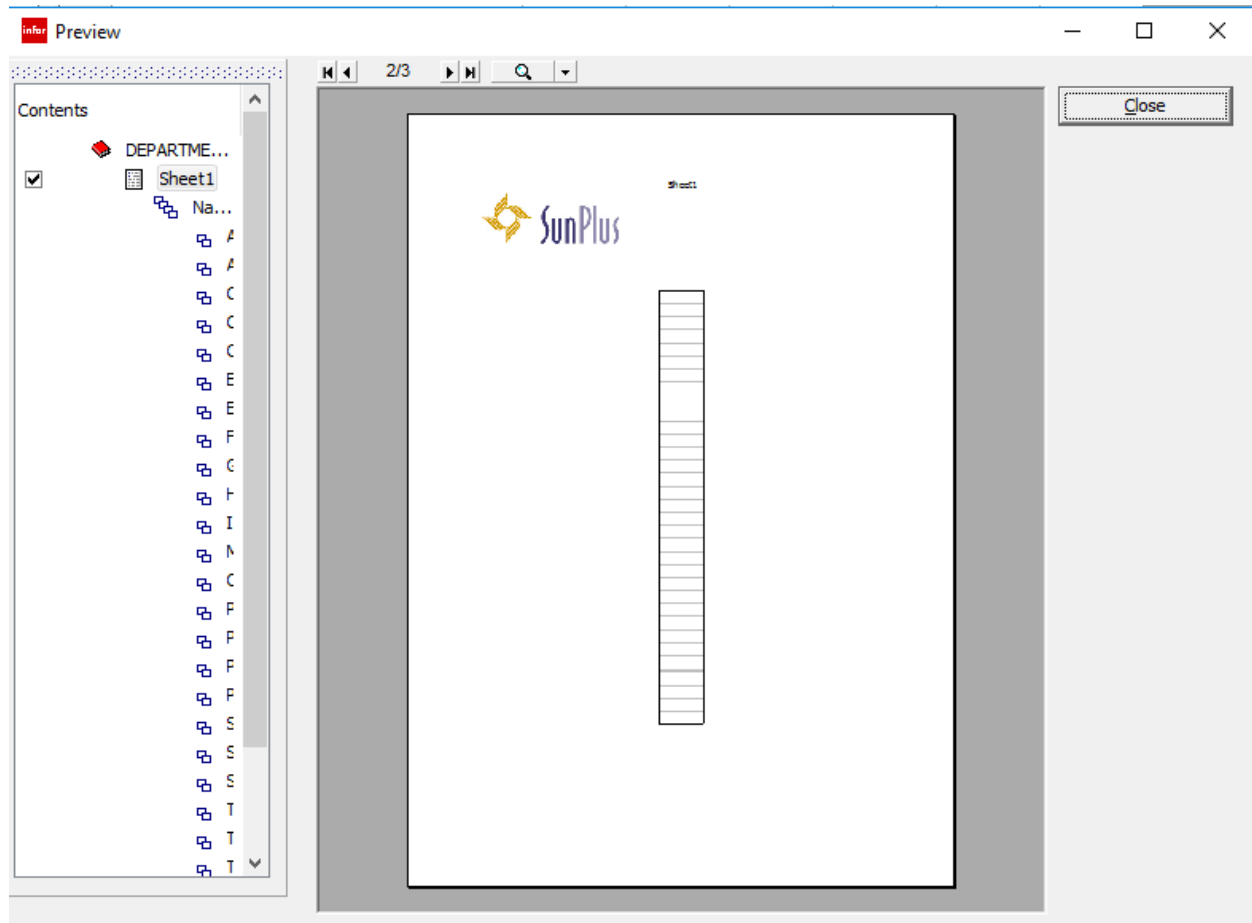Take another look at the Preview screenshot.

Notice that the headers above the SunPlus logo says Sheet1. That is not nice.

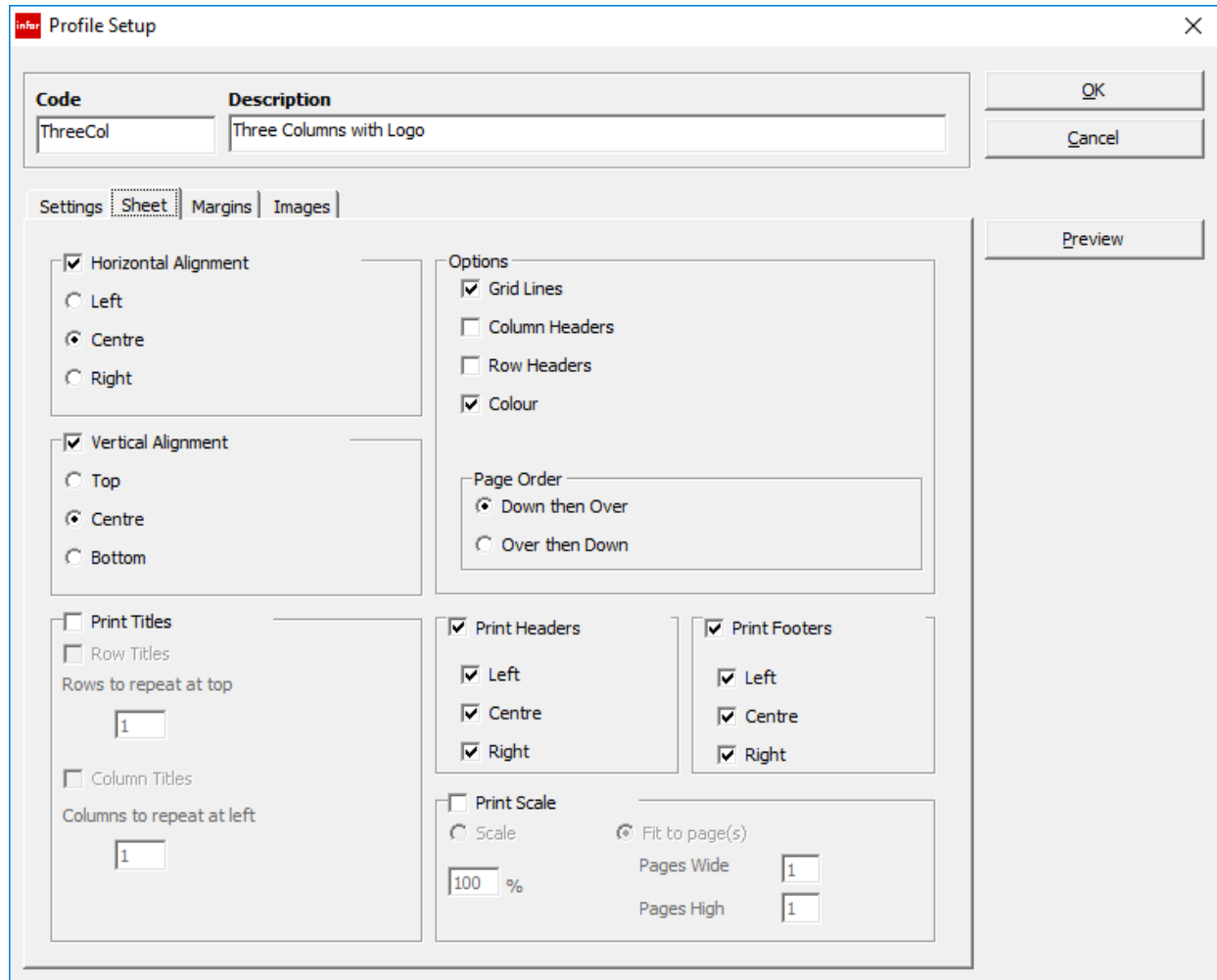Also, when the Next Page arrow is clicked, there is a blank sheet.

This is also not nice. The profile can be edited to make any necessary changes.

Return now to profile setup in Page Setup.

- Select the Profile to be modified (in the lower pane)
- Click the Edit button

- Open the Sheet tab

- Uncheck the Print Header checkbox
- Uncheck the Print Footer checkbox

SunPlus

Profile Setup ✕

Code	Description
ThreeCol	Three Columns with Logo

OK
Cancel

Settings | **Sheet** | Margins | Images

Preview

☑ Horizontal Alignment
○ Left
● Centre
○ Right

☑ Vertical Alignment
○ Top
● Centre
○ Bottom

Options
☑ Grid Lines
☐ Column Headers
☐ Row Headers
☑ Colour

Page Order
● Down then Over
○ Over then Down

☐ Print Titles
☐ Row Titles
Rows to repeat at top
[1]

☐ Column Titles
Columns to repeat at left
[1]

☐ Print Headers
☑ Left
☑ Centre
☑ Right

☐ Print Footers
☑ Left
☑ Centre
☑ Right

☐ Print Scale
○ Scale
● Fit to page(s)
[100] %
Pages Wide [1]
Pages High [1]

- Click OK to see whether the edit has made a difference
- Click Preview

- The logo is still there, but it is very high. Adjusting the margins would get that to move down the page a bit
- Click the Edit button again

- On the Sheet tab, check Print Scale, and make sure Fit to page(s) is selected
- This will mean each report sheet will fit on one page