

PTReportGen Frequently Asked Questions

About

What is PTReportGen?

PTReportGen is a report generator for Microsoft PowerPoint that uses Microsoft PowerPoint as reporting tool and outputs reports in Microsoft PowerPoint format.

What can I do with it?

If you know how to use Microsoft PowerPoint and write SQL statements, you can use PTReportGen to create all kinds of reports as you need. The report generated by PTReportGen is a Microsoft PowerPoint presentation or other format file, such as GIF.

What are the main features?

- Using Microsoft PowerPoint as your reporting tool
- Making report template directly using Microsoft PowerPoint
- Accessing to databases using SQL
- Creating reports without programming experience
- Connection to all databases using ODBC
- Supporting multi-databases in one report
- Generating reports with parameters
- Supporting Windows mode and command line mode
- Creating complex reports
- Creating reports with charts
- Creating reports with pictures

- Many reports in one Microsoft PowerPoint presentation
- Conversion of file formats
- Generating reports automatically
- One time configuration
- Flexible deployment

Can I make the complex report using PTRReportGen?

Yes. This is a main feature of PTRReportGen. The complexity might come from reports formatting as well as reports content.

- The complex report formatting

You design reports like layouts, styles, formatting directly using Microsoft PowerPoint. You can take full advantage of Microsoft PowerPoint including text formatting, tables, charts, pictures and graphics, drawing, headers and footers, and more.

- The complex report content

In one report, you can execute more than one SQL statement, and get data using different queries. Further more, you can create a temporary table, prepare data using many SQL statements including INSERT/UPDATE/DELETE/INSERT SELECT, and then make a report.

Do you have any server version which I can use on the server to generate the reports?

No. But PTRReportGen can be run on your desktop or server. So you can use PTRReportGen on the server to generate the reports. If you want to run it in the background on the server, you need to run it in command line mode.

What is the system requirement?

- Microsoft Windows 95, Windows 98, Windows NT, Windows 2000, Windows

XP, Windows 2003 or later.

- Microsoft Office 2000, Office XP, Office 2003 or later.

Installation

How to install it?

Unzip the download file. Run setup.exe, and follow the instructions to complete installation.

If you don't have installed Microsoft Office, please install it first.

If your environment is Windows 95/98 and Office 2000, and you don't have installed VB6.0 run-time files, please install it. For Windows 2000, Windows XP, Windows 2003 and Office 2000 or later, you do not need to install VB6.0 run-time files because they are included in these OS and Office. To install VB6.0 run-time files, just run vbrun60sp5.exe, and follow the instructions.

If you don't have installed ODBC Driver for the database you want to access, please install it.

If your OS is Windows 95/98 and you don't have installed MS Data Access Components 2.0 (MDAC_TYP) or later, please install it. For Windows 2000, Windows XP and Windows 2003, you do not need to install MDAC_TYP because it is preinstalled in these OS. To install MDAC_TYP, just download and run mdac_typ.exe.

How to uninstall it?

You can uninstall PTRReportGen from [Control Panel].

1. Double-click the Add/Remove Programs icon in the Windows Control Panel.
2. Do one of the following:

- For Windows 2000, Windows XP and Windows 2003 Edition:

Click **PTRReportGen** in the **Currently installed programs** box, and then click

the **Change/Remove** button.

- For Windows 98 and Windows NT 4.0:

Click **PTReportGen** on the **Install/Uninstall** tab, and then click the **Add/Remove** button.

3. Follow the instructions on the screen to complete uninstall.

Reporting with PTReportGen

How does it work?

To create a report with PTReportGen, you should do as follows:

1. Create a report template file using Microsoft PowerPoint, and define the layouts, styles, formats of reports.
2. Create a PTR file with a .ptr extension using PTReportGen. The PTR file tell PTReportGen how to extract data from database, and where and how to put data.
3. Run the PTR file to generate a report in Microsoft PowerPoint format.

Where can I find some samples?

After PTReportGen is installed, some sample reports are installed too. The sample reports include a sample database, some report template files (.ppt) and PTR files (.ptr). They are located in the PPTReport directory under \Samples.

What need I do to use samples?

To use these samples, you must add a data source named "Report Sample", and specify the database "Sample.mdb". If you have not installed MS access ODBC driver, please install it first.

Creating a System DSN for a Microsoft Access Database

1. Click the Windows **Start** button, choose **Settings**, and then click **Control Panel**.
2. On computers running Microsoft Windows 2000 or later, double-click **Administrative Tools**, and then double-click **Data Sources (ODBC)**. The **ODBC Data Source Administrator** dialog box appears. On computers running previous versions of Microsoft Windows, double-click **32-bit ODBC** or **ODBC**.
3. Select the **System DSN** tab, and then click **Add** button.
4. Choose **Microsoft Access Driver (*.mdb)**, then click **Finish** button.
5. In the **ODBC Microsoft Access Setup** dialog box, type **Report Sample** in the **Data Source Name** box.
6. Click the **Select** button, and browse to select **Sample.mdb**.
7. Click **OK** button to close the **ODBC Microsoft Access Setup** dialog box.
8. Click **OK** button to close the **ODBC Data Source Administrator** dialog box.

How can I use these samples?

1. Run PTRReportGen.
2. Open a PTR file. Click **Open** on the **File** menu.
3. Run the PTR file to generate a report. Click **Run** on the **Report** menu.
4. Open, view and check the report. Click **Open Report File** on the **File** menu.
5. Open, check the log file. Click **Open Log File** on the **File** menu.

The sample reports can be changed to adapt to your own needs.

When I use samples, I receive a "Selected Collating Sequence Not Supported" error message.

This is a problem of multilanguage. You are trying to open a database or an object in a database that was created in another language edition of Microsoft Access. You can try as follow:

1. Open the database "sample.mdb" using Microsoft Access.
2. On the **Tools** menu, click **Options**, and then click the **General** tab.
3. Make sure that the **New Database Sort Order** is set to General and then click **OK**.

If you do not resolve the problem, please install or enable multilanguage support for your operating system. For more information, please refer to

<http://support.microsoft.com/default.aspx?scid=KB;en-us;q202150>

<http://support.microsoft.com/default.aspx?kbid=184988>

You can create a new database on your computer, export data from "sample.mdb", and import into your database.

What is a report file?

The report file is a Microsoft PowerPoint presentation generated by PTRReportGen.

What is a report template file?

To make a report using PTRReportGen, you should create a report template file first. This report template is a Microsoft PowerPoint presentation that defines the layouts, formats and styles of the report. In the report template, you can input static content such as titles, descriptions, comments, a cover, a company logo, and set the format for the static content and data got from data sources.

What is a PTR file?

To generate a report with PTRReportGen, you must create a PTR file with a .ptr extension. The PTR file contains information such as the name of the report template file, the name of the report file, log file name, data sources, parameters and functions. The PTR file tells PTRReportGen how to get data from data sources and how to put data into a report.

What is a function?

A function includes a SQL statement and some arguments. A function can be used to execute a SQL statement, and tell PTRReportGen whether or how to add data into a report.

How can I test a SQL statement?

You can test SQL statements using Microsoft Query that is a component of Microsoft Office. You can find it under the installation directory of Microsoft Office.

"C:\Program Files\Microsoft Office\OFFICE11\MSQRY32.EXE"

When I execute a SQL statement, I receive an "ODBC driver does not support the requested properties." error message.

It probably is a wrong SQL statement. Such as a missing column, or syntax error.

How can I sort data?

Use SQL to sort your data. In a SELECT statement, you can use the ORDER BY clause to have your results displayed in a sorted order.

How can I have total?

You can use aggregate function in SQL statement.

1. In the fixed table report, you can add total directly using a separate SQL.
2. In the variable table report, you must add total first using a Fixed Table report function before you use the Variable Table report function. Because the cell address of the total field will change after you use Variable Table report function.

How can I group data?

To group data in a report, you can use GROUP VARIABLE TABLE REPORT function. For more detail information, refer to PTRReportGen Help and the samples customer_profile.ptr, product_catalog.ptr and sales_detail.ptr within PTRReportGen.

How can I make sub reports within the main report?

A subreport is a report within a report. A subreport would typically be used to perform one-to-many lookups such as Customer / Order / OrderDetails.

To make sub reports within the main report,

1. Write a JOIN SQL statement to access data from two or more tables. For example, you can join Customers, Orders and OrderDetails tables.
2. Use GROUP VARIABLE TABLE REPORT function.

For more detail information, refer to the samples product_catalog.ptr and sales_detail.ptr within PTRReportGen.

How can I have sub-totals for each group?

You can use aggregate function in SQL statement.

1. Use aggregate function and GROUP BY clause, get summary data for each group, and insert results into a temporary table.
2. If you have different kinds of summaries, repeat the step 1, and insert results into another temporary table.
3. Use group report function, and join the detail data and the summary data using JOIN. The summary fields must be included in the group list.
4. Except for sub-totals, you can add total too using aggregate function in SQL statement. You must add total first using a Fixed Table report function before you use the Variable Table report function. Because the cell address of the

total field will change after you use Variable Table report function.

For more information, refer to the sample sales_detail.ptr within PTRReportGen.

How to use parameters?

In SQL statements, you can use parameters.

1. To use a parameter, you must declare it first. A parameter has a name, a title and a default value. To define a parameter, click **Configuration** on the **Report** menu, and click the **Parameter** tab

2. In SQL statements, use the parameter name.

PTReportGen will replace the parameter name with the actual value before it submits the SQL statements to data sources.

Example

Define a parameter as follows:

Name: \$CustomerName

Title: Customer Name

You can use the parameter name "\$CustomerName" in SQL statements. The parameter name in SQL statements should be delimited by quotation mark.

For example:

```
SELECT CompanyName
,CityName
,CountryName
,ContactName
FROM Customers, Cities, Countries
WHERE Customers.CityCode = Cities.CityCode
AND Customers.CountryCode = Cities.CountryCode
AND Customers.CountryCode = Countries.CountryCode
AND CompanyName LIKE '$CustomerName%'
```

I need to change paths for both exported report and template location. Is there any way?

You can use parameters in the path and name of the report file, template file and log file. For example, you define a parameter \$CustomerID, you can name the report file as follows:

report\report_ \$CustomerID.ppt

report\ \$CustomerID\report.ppt

Can I place the data into columns rather than rows?

Of course, just write FILLORDER=col in REPORT function. For example, there are 1 field and 10 records, you can show them as 1 row and 10 columns on report.

How to create Microsoft PowerPoint reports with pictures?

You can insert pictures into your report from using many popular graphics files PTRReportGen.

1. Store the path and name of the graphics files in the database.
2. Identify the image fields in the report function.
3. To specify the size, you can write a formatting expression into the cell or field in the report template file.

PTReportGen will read the graphics files, insert them into the report, and change the size of the pictures.

I want to use FROM report. How can I know the name of a shape or text box?

To use a form report, you can reference a shape or text box by its name. We developed a PowerPoint add-in "name.ppa" that can display the name of an object and rename the object in a slide. You can find the add-in under the

PTReportGen's working directory.

How do I load a PowerPoint add-in?

To load an add-in:

1. Launch Microsoft PowerPoint.
2. Click **Add-Ins** under **Tools** menu. The **Add-Ins** dialog box appears.
3. Press **Add New** button, and browse to the add-in file, and Press **OK** button.
4. If prompted to enable macros, press **Enable Macros** button. The add-in will be listed in the **Add-Ins** dialog box. Press **Close** button to close the dialog box.

I tried to load an add-in but I do not see it listed in my Add-Ins dialog box.

Why?

Check the macro settings. If this is not set to at least **Medium**, the add-in won't load. To resolve this:

1. Click **Macros** under **Tools** menu, and click **Security**. The **Security** dialog box appears.
2. Click the **Security Level** tab, and click **Medium**.
3. Press **OK** button.
4. Now load the add-in.
5. Once the add-in has been loaded you can set the security level back to High.

I can not save the change to the name of object. What is wrong?

I have renamed the object in a slide using the add-in "name.ppa", and saved the PowerPoint file. But I find I do not save the change when I reopen the PowerPoint file. It may be a problem of Allow fast saves option. You should save a complete file.

1. On the **Tools** menu, click **Options**, and then click the **Save** tab.

2. Clear the **Allow fast saves** check box when you finish working on the file, and then save it one last time. A full save occurs when this check box is clear.

Do I need to execute more than 1 SQL statement in one report processing?

In most of reports, you just need to execute one SQL statement. But sometimes, you want to execute more than one SQL statement in one report processing.

- The data are located in different tables or databases, and you get data using different queries.
- There are many reports in one report file.
- You want to create a temporary table, prepare data using many SQL statements including INSERT/UPDATE/DELETE/INSERT SELECT, and then make a report.

How many SQL statements can I execute in one report processing?

It is dependent on the license of PTRReportGen you have purchased. For detailed information, see Licenses.

I want to programmatically change some of the functions in the ptr file.

How?

The PTR file is a text file. You can write a program to make a PTR file using C, Perl or DOS shell, and then run PTRReportGen to generate report. These steps can be written into a batch file.

I do not want to save password in the PTR file. Can I use PTRReportGen?

Yes. If you do not save a password in the PTR file, a login dialog box will appear when you run the PTR file in PTRReportGen. You can input password

interactively to log on to the data source. If you want to run PTRReportGen in command line mode, you can input usernames and passwords in command line.

Support

How much will I pay for the technical support? Is it free?

Yes, it's completely free for all.

I have more questions - who should I write to?

Please send your additional questions to support@ljzsoft.com.