

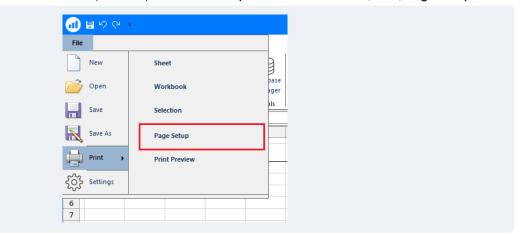
# Page Setup

### Overview

One difference between an amateurish document and a professional-looking one is the formatting of the content. A report that is organized and easy to read inspires confidence in the content therein. This document highlights how the Page Setup properties of a Report Template can be used to control the appearance of the reports when they are published as web pages, PDF, and printouts.

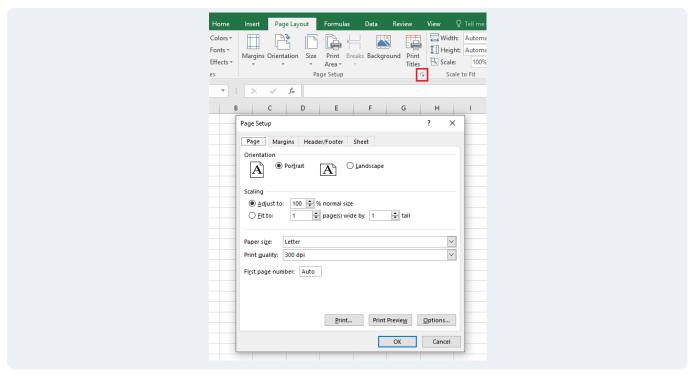
## Page Setup

The Page Setup settings are available in an open template in the **Template Studio** under **File**, **Print**, **Page Setup**.



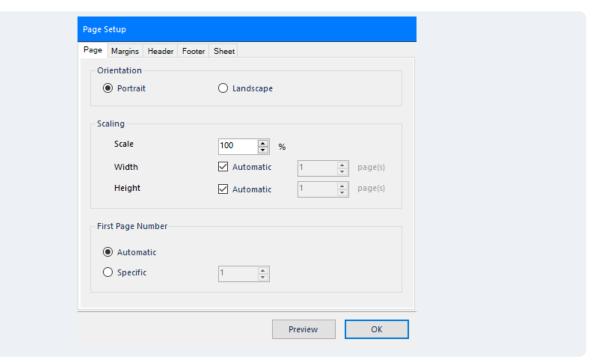
Each worksheet has its own **Page Setup** settings. The **Print Preview** option can be used to validate any setting configured.

While this document focuses on the **Page Setup** features in the **XLReporter Template Studio**, if templates are designed in Excel, these same settings are available under the **Page Layout** tab.



### **Settings**

#### **Page Tab**

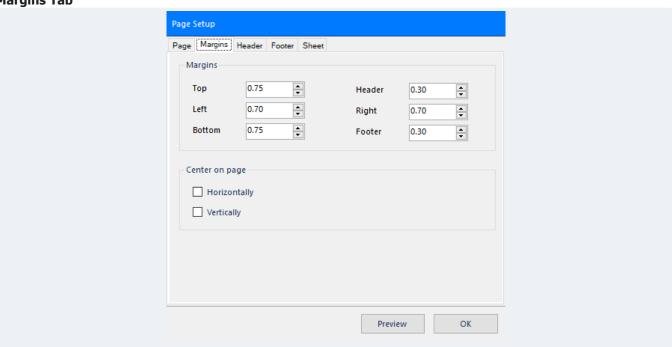


The settings in the Page tab can be adjusted to change how the page itself appears.

The Orientation can be changed so that the page will print vertically (Portrait) or horizontally (Landscape).

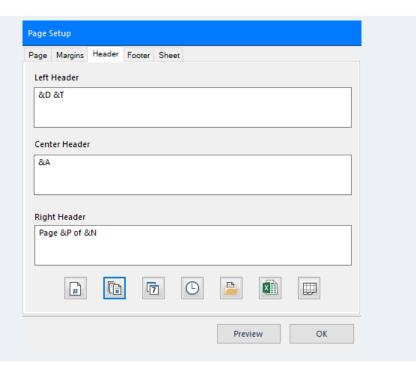
**Scaling** is used to change the size of the content in the page. The **Width** and **Height** options control how many pages the width and height of the worksheet content span. Additionally, **First Page Number** can be used to change what number the page numbers start at if page numbers are displayed in the **Header** or **Footer**.

#### **Margins Tab**



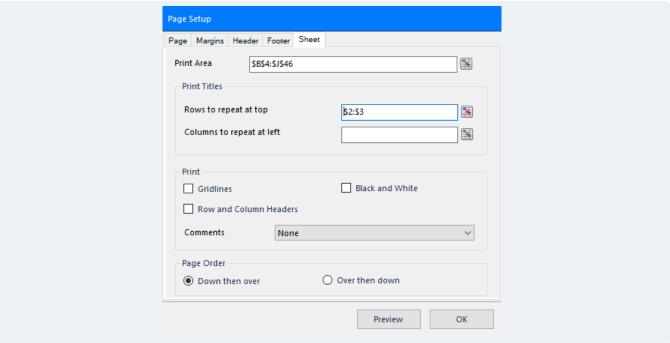
This tab displays the margin settings for the page. These settings increase or decrease the distance between the worksheet content and the edge of the page, as well as the distance between the header and footer and the edge of the page. If the content does not fill an entire page the **Center on page** setting can be used to center the content **Horizontally** and/or **Vertically**.

#### **Header and Footer Tab**



The **Header** and **Footer** of each printed page can be customized under these tabs. These can be manually entered in the appropriate box for **Left**, **Center**, and **Right**. There are also buttons available at the bottom which automatically inserts items like the **Page Number**, **Number of Pages**, **Date**, **Time**, **File Path**, **File Name**, and **Sheet Name** into the currently selected box.

#### **Sheet Tab**



The **Sheet** tab controls what is actually printed on the worksheet.

The **Print Area** can be used to define specific areas of the worksheet to print rather than the entire worksheet. This can be set to a cell range (e.g., \$A\$1:\$D\$15) a set of columns (e.g., \$A:\$D) or a set of rows (e.g., \$1:\$15). The columns and rows options can be very useful if you do not know how much data will be brought into the report when it is run. Multiple ranges, columns or rows can be specified for Print Area, comma separated (e.g., \$A\$1:\$D\$15,\$F\$1:\$H\$25)

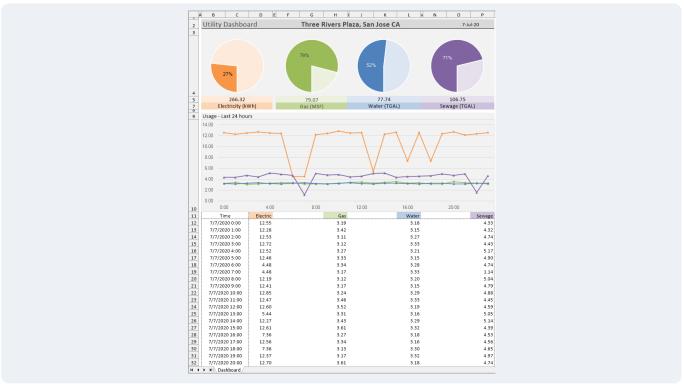
The **Print Titles** settings can be used to define **Rows** or **Columns** of cells on the worksheet that appear on every printed page of the worksheet. This can be very useful in a long columnar report where the headings are at the top. This is discussed in the scenarios below.

By default, when a worksheet is printed, gridlines as well as row and column headers (e.g., the row numbers and column letters) are not printed. These can be enabled by checking the settings under Print. Cell comments can also be printed and to save on ink the worksheet can be set up to print in black and white.

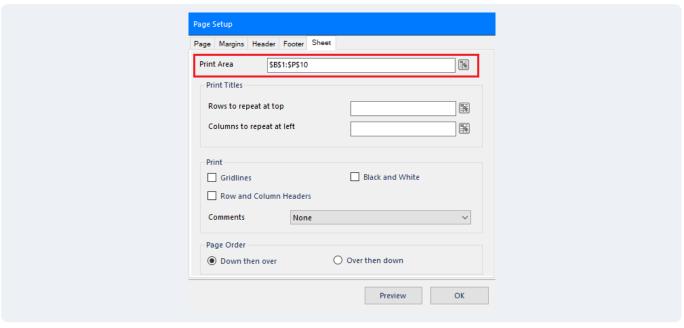
If there are multiple worksheets to the right as well as down, the **Page Order** settings determine the order in which they are printed.

## Scenario: Using Print Area to control what is seen

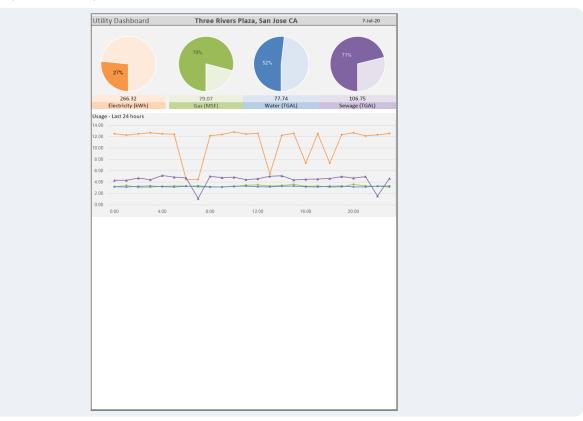
A customer has a report that has multiple charts at the top and a table of data beneath which is represented by the charts. When the report is published as PDF (or printed), the customer wants the graphs to appear but not the data since it takes up too many pages.



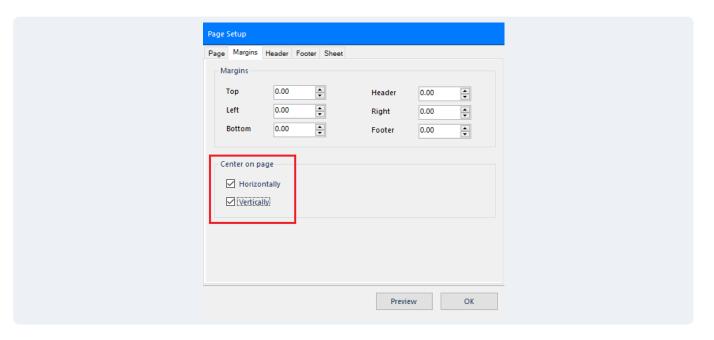
To accomplish this, in Page Setup, under the Sheet tab, the Print Area can be set to \$B\$1:\$P\$10.



When the report is published, only the charts are shown.



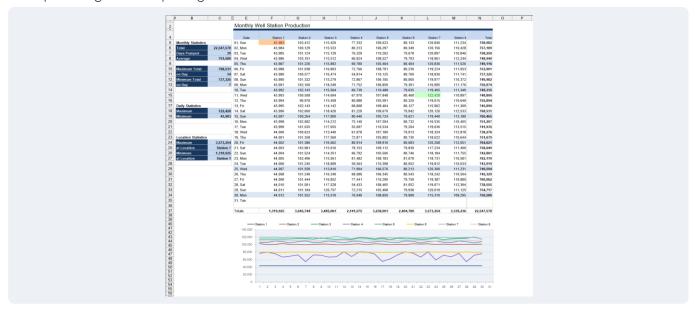
However, since this only covers half the page, the entire bottom is left as whitespace. To make this look better, back in **Page Setup**, under the **Margins** tab, for **Center on page**, both **Horizontally** and **Vertically** are checked.





## Scenario: Designing a Dashboard for Big Screen Monitor

A customer has a report that they just created, and they are having trouble getting it to look how they want it to when publishing as PDF or printing.

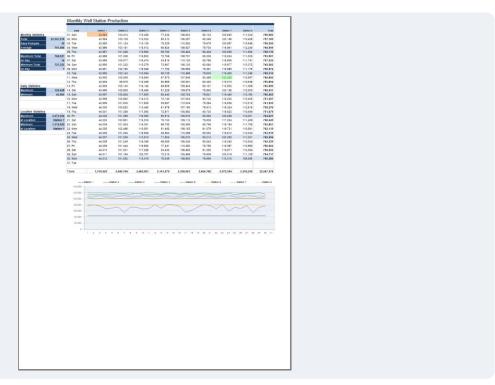


It looks great in the Workbook Viewer, but when viewing it in **Print Preview**, it does not look exactly how they want it; it is too small and leaves too much empty space at the bottom of the page. They want their report to effectively use the space on the page.

This can be accomplished by changing the orientation in the Page tab.

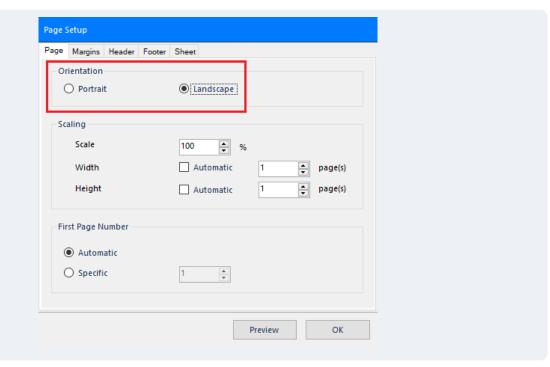
**Portrait** displays the page vertically while **Landscape** displays the page horizontally.

#### **Portrait**

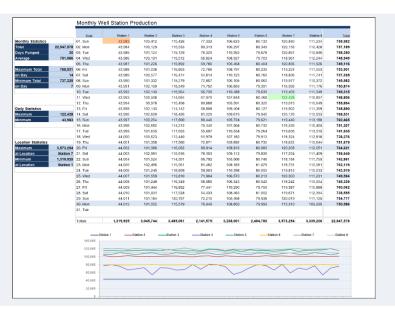


By default, the **Orientation** is set to **Portrait**.

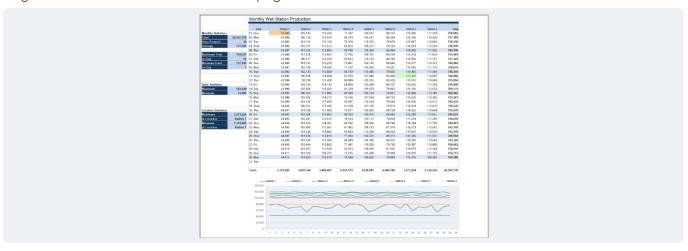
For this report, it makes more sense for the **Orientation** to be set to **Landscape** since the content's width is greater than its height.



Landscape



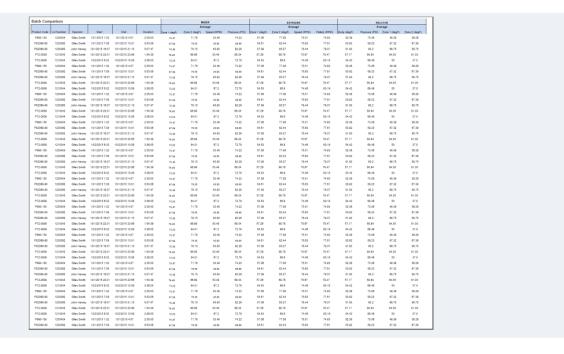
There is still one issue: the bottom of the report is cut off and is continued in page 2. This happens if the **Height** setting is set to Automatic. Unchecking this box and setting the **Page(s)** to 1 prevents this from happening. This forces the height of the worksheet content to fit into 1 page.



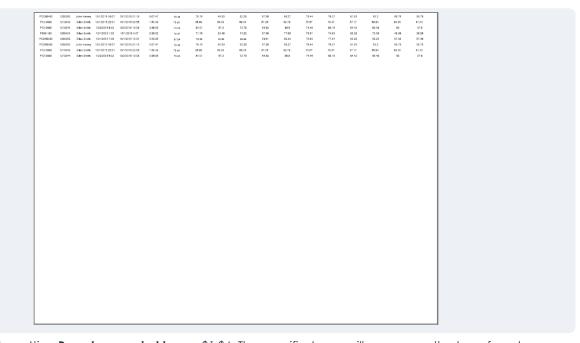
## Scenario: Dynamic Report – Repeating headings at the top of all pages

A customer has a Batch Report where the worksheet contains all the data collected during the cycle. This may result in a report with one or more published sheets depending on how long the batch cycle is. The customer wants the headings to be on every page but does not want to manually insert them every time.

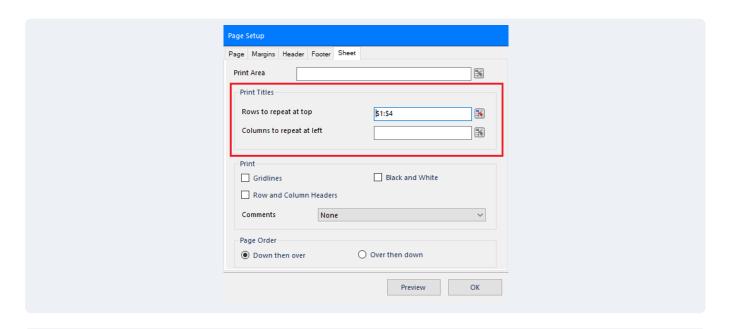
Page 1

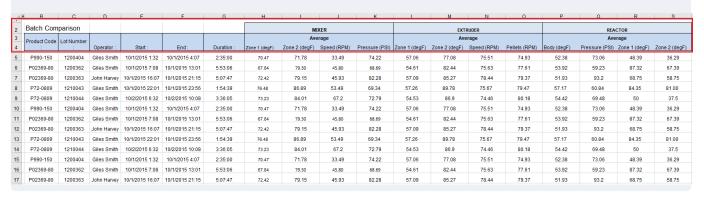


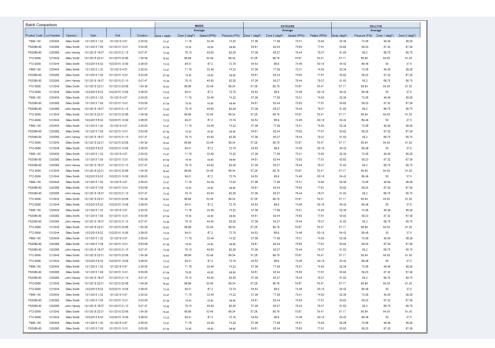
Page 2

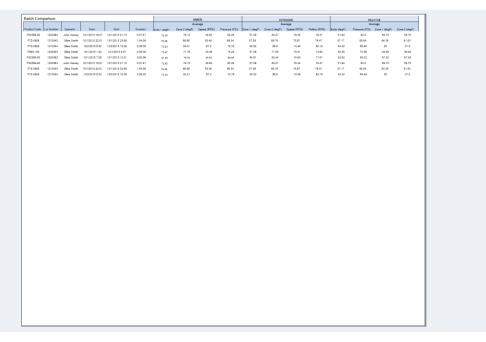


This can be done by setting **Rows to repeat at top** as \$1:\$4. The specified rows will appear on the top of each page.







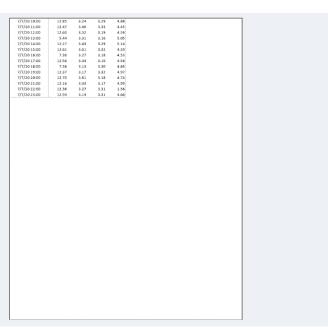


## Scenario: Optimizing Display for a Responsive Mobile Report

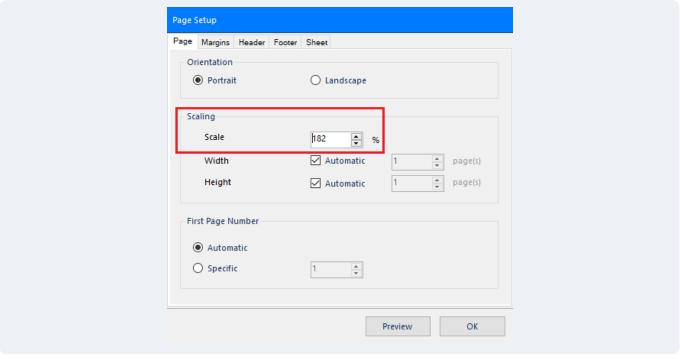
A customer has a report that they want to be able to view on a mobile device, but it does not look right when they preview it, even after redesigning the layout of the report to fit on a mobile device. However, not only does the report layout itself need to change, but the **Page Setup** settings as well.

Page 1

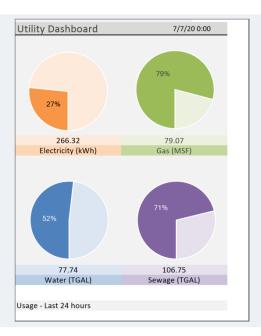




One thing that can be done is to adjust the **Scale**. This setting increases or decreases the size of the worksheet content on the page.



When set to 182%, the result looks closer to what one would want from a mobile report.



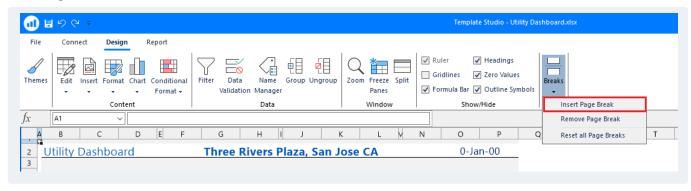
Page 2



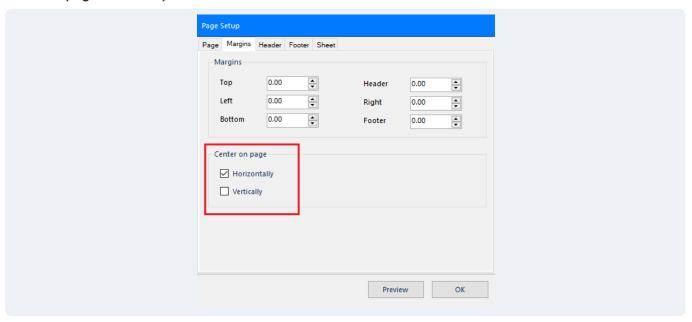
However, some things still need to be adjusted.

The bottom of the first page contains the heading for the chart at the top of the second page.

This can be fixed by inserting a **Page Break**. After selecting the row or column, under the **Design** tab select **Breaks**, **Insert Page Break**.

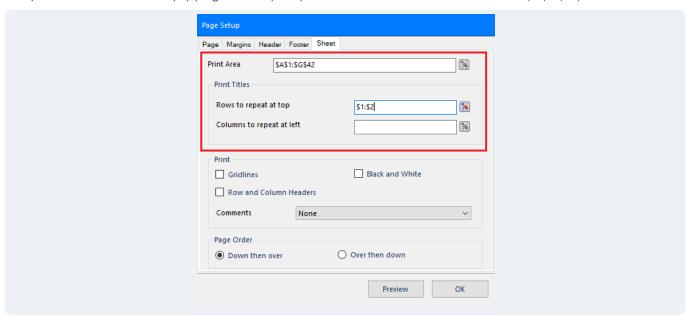


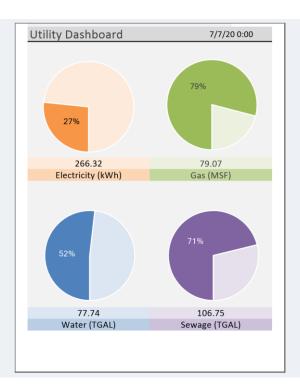
Currently, the content in the page is not centered **Horizontally**. This can be fixed under the **Margins** tab by checking **Center on page Horizontally**.



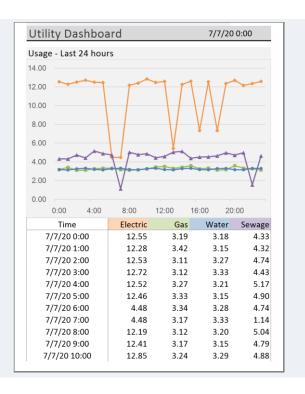
The customer also wants the heading of the report (seen on the top of the first page) on each page. To accomplish this, **Rows to repeat at top** is set to \$1:\$2.

Lastly, there are still some empty pages in the print preview. To fix this, set the **Print Area** to \$A\$1:\$G\$42.





## Page 2



Utility Dashboard		7/7/20 0:00		
7/7/20 11:00	12.47	3.46	3.33	4.45
7/7/20 12:00	12.60	3.52	3.19	4.59
7/7/20 13:00	5.44	3.31	3.16	5.05
7/7/20 14:00	12.27	3.43	3.29	5.14
7/7/20 15:00	12.61	3.61	3.32	4.39
7/7/20 16:00	7.36	3.27	3.18	4.53
7/7/20 17:00	12.56	3.34	3.16	4.56
7/7/20 18:00	7.36	3.13	3.30	4.65
7/7/20 19:00	12.37	3.17	3.32	4.97
7/7/20 20:00	12.70	3.61	3.18	4.74
7/7/20 21:00	12.16	3.33	3.17	4.99
7/7/20 22:00	12.36	3.27	3.31	1.56
7/7/20 23:00	12.59	3.14	3.31	4.66