# Adding Formulas to an Excel Report

OfficeWriter Enterprise Edition allows you to create custom formulas. The formulas can be based on query results, report parameters, or they may access a set of global variables that Reporting Services contains.

| Formula Topics |
|---|
| • Reporting Services Global Variables<br>• Parameters in Reporting Services Formulas<br>• Building Formulas from DataSets<br>• Inserting Formulas into an Excel Report<br>• Managing Formulas |

## Reporting Services Global Variables

Reporting Services contains global variables that you can access if you have OfficeWriter Enterprise Edition. To access the global variables:

1. On the OfficeWriter toolbar, click **Formulas** and select **Add Formula**.

2. In the **Insert Formula** dialog, click the **+** next to **Globals** to open the list of Reporting Services global variables.
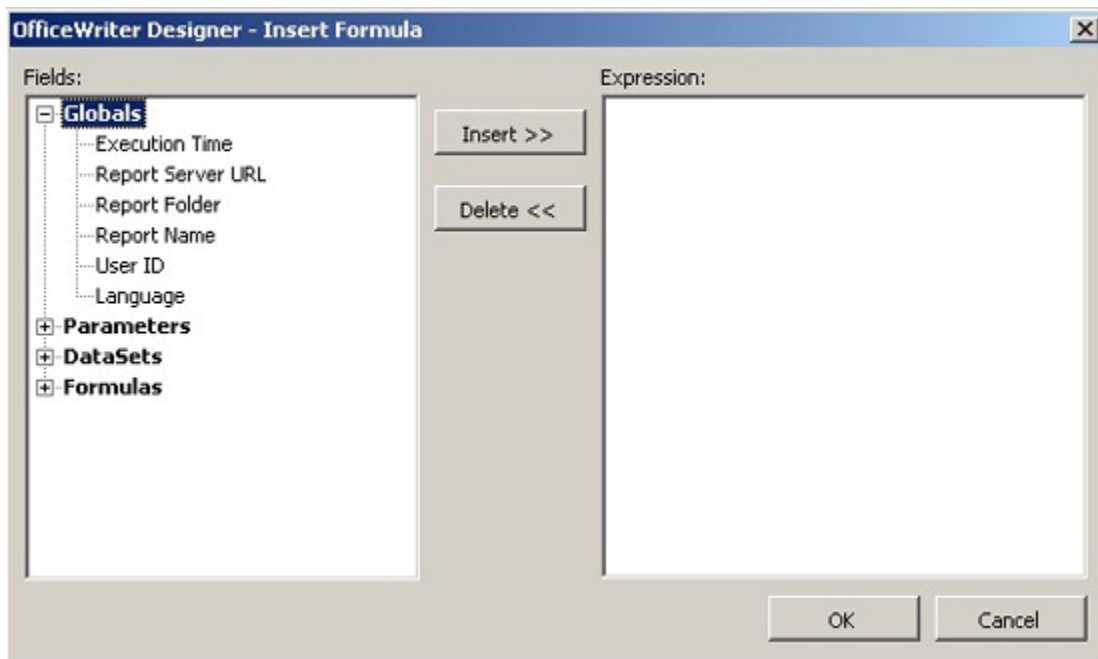


You will see six global variables:

| | |
|---|---|
| **Execution Time** | The report's execution time |
| **Report Server URL** | The URL of the server running the report |
| **Report Folder** | The folder on the Report Server containing the report |
| **Report Name** | The Name of the report |
| **User ID** | The ID of the user logged on |
| **Language** | The report language |

3. Select **Execution Time** from the list.

4. Click **Insert** and **Ok**.

5. Click **Formulas** and select **Add Formula**.

6. Expand the **Globals** list.

7. Select **Report Server URL** from the list.

8. Click **Insert** and **Ok**.

9. Repeat the steps above until you have added all six global variables. When you select **Formulas**, you should see:
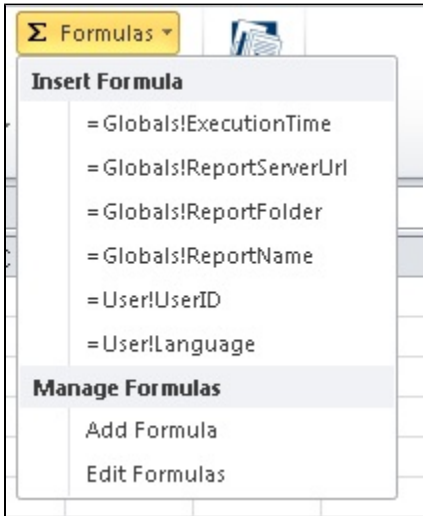


## Parameters in Reporting Services Formulas

You can also use this approach to build formulas that use the parameter values. These formulas can be inserted into the report to display the parameter values selected when running the report.

1. Select **Formulas** > **Add Formula**

2. Expand the **Parameters** section

3. Select a parameter and click the **Insert** button
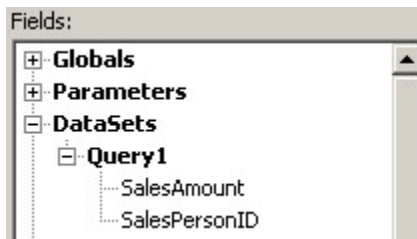
4. Click **OK**.

## Building Formulas from DataSets

This section will cover how to create a formula using data from a data set. This particular example will use the **SUM** function:
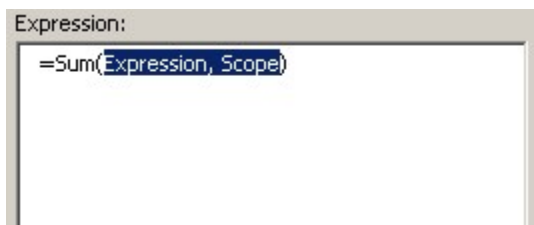
1. Click **Formulas** on the OfficeWriter toolbar and select **Add Formula**.

2. Click the **+** to expand the **Formulas** list.

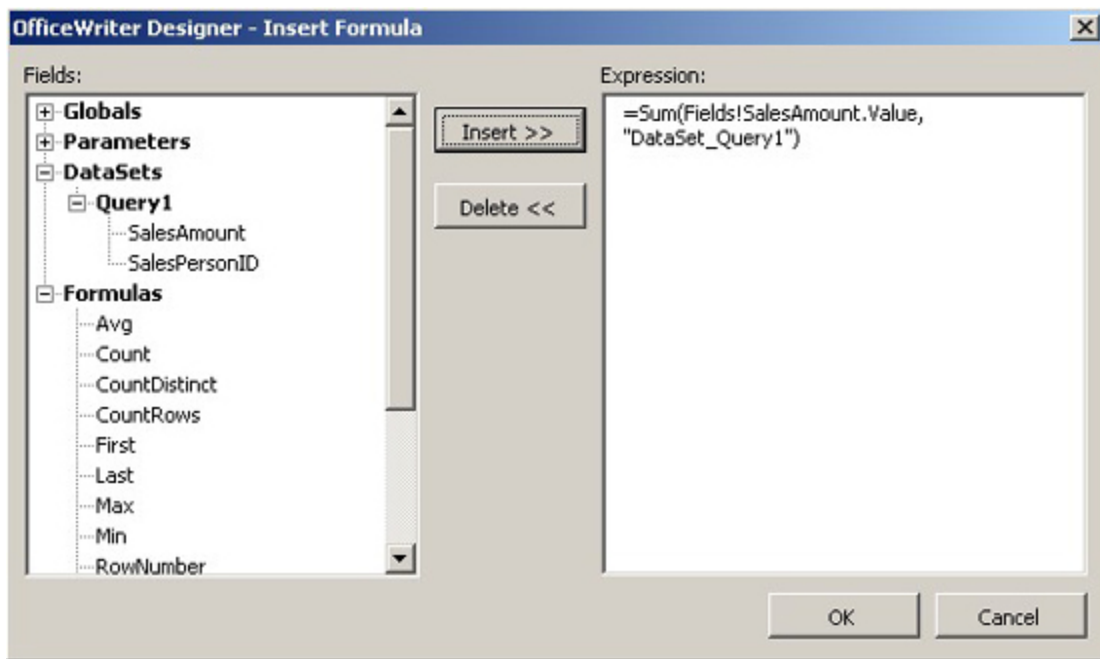3. Scroll down, select **SUM**, and click insert.
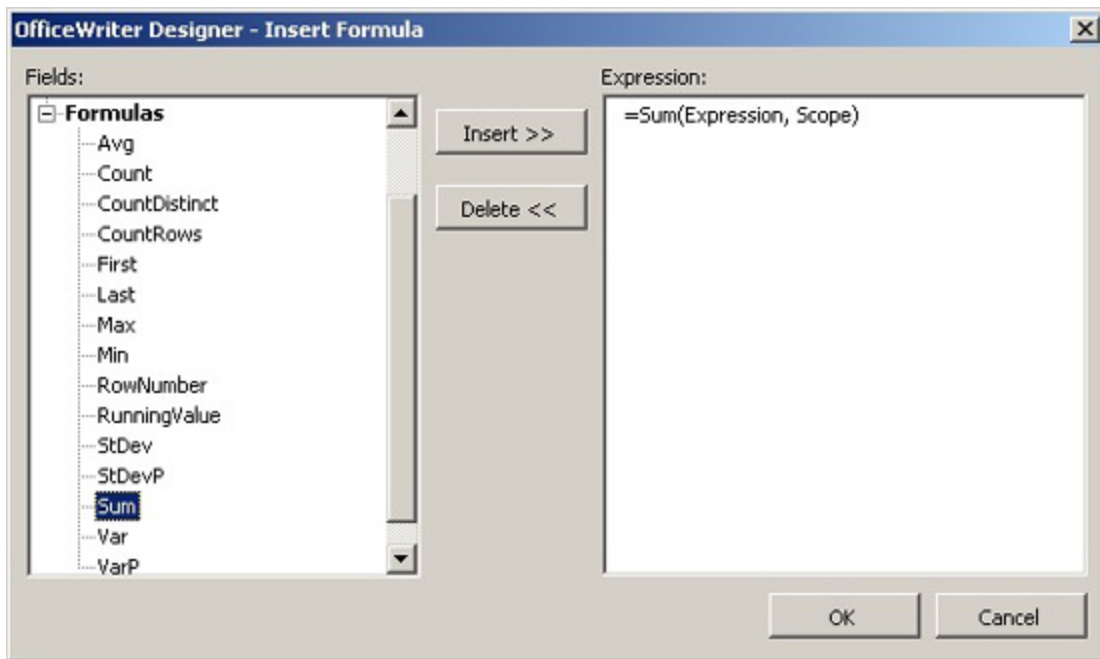
4. Click the **+** to expand the **DataSets** list.

5. Find your query and click its **+** to open it.



6. In the **Expression** list on the right, highlight everything inside the SUM parentheses, as shown.



7. Click **SalesAmount** and **Insert**. Your formula should now look like this:

8. Click **Ok** to return to your worksheet.

## Inserting Formulas into an Excel Report

To insert a formula into a cell in an Excel report:

1. Place your cursor in the desired cell

2. Go to **Formulas** in the OfficeWriter Designer toolbar

3. Under the **Insert Formula** section, select the formula to insert into cell

Below is an example of a template that has formulas for all the global variables and a formula made from a data set:

| | A | B |
|---|---|---|
| 1 | Execution Time | %%=RS_FORMULA.Formula1 |
| 2 | Report Server URL | %%=RS_FORMULA.Formula2 |
| 3 | Report Folder | %%=RS_FORMULA.Formula3 |
| 4 | Report Name | %%=RS_FORMULA.Formula4 |
| 5 | UserID | %%=RS_FORMULA.Formula5 |
| 6 | Language | %%=RS_FORMULA.Formula6 |
| 7 | | |
| 8 | Sales Person ID | Sales Amount |
| 9 | %%=Query1.SalesPersonID | %%=Query1.SalesAmount |
| 10 | Total | %%=RS_FORMULA.Formula7 |
| 11 | | |
| 12 | | |

Here is what that example template looks like when it's been populated with data:

| | A | B |
|---|---|---|
| 1 | Execution Time | 3/18/2005 2:47:30 PM |
| 2 | Report Server URL | http://charon/ReportServer |
| 3 | Report Folder | /SoftArtisans/ExcelReports |
| 4 | Report Name | FormulaSample |
| 5 | UserID | martinr |
| 6 | Language | en-US |
| 7 | | |
| 8 | Sales Person ID | Sales Amount |
| 9 | | 29485963.76 |
| 10 | 27 | 12647729.83 |
| 11 | 24 | 12157927.19 |
| 12 | 38 | 11252038.77 |
| 13 | 37 | 10302726.69 |
| 14 | 29 | 8714865.97 |
| 15 | 26 | 7929164.967 |
| 16 | 31 | 7210650.498 |
| 17 | 23 | 6742465.108 |
| 18 | 34 | 5505602.675 |
| 19 | 33 | 4380714.255 |
| 20 | 302 | 2814958.894 |
| 21 | 35 | 2241204.042 |
| 22 | 22 | 1839370.909 |
| 23 | 36 | 1758385.926 |
| 24 | 14 | 1369624.649 |
| 25 | 21 | 891983.6435 |
| 26 | 20 | 219088.8836 |
| 27 | Total | 127464466.7 |
| 28 | | |
| 29 | | |
| 30 | | |

# Managing Formulas

Officewriter Designer gives you the ability to manage and maintain formulas you've built. The Formula Manager allows you to change, delete, and build new formulas. To start the Formula Manager, click the **Formulas** button on the OfficeWriter toolbar and select **Edit Formulas**.

## OfficeWriter Designer – Formula Manager

Select formula:

MyFirstFormula
MySecondFormula

Add New ...

Edit ...

Rename ...

Delete

Formula Value

Close
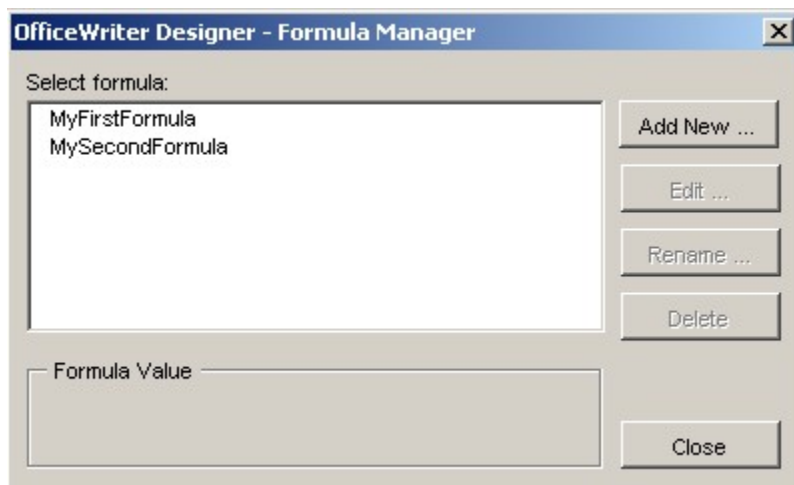
## To build a new formula:

1. Click the **Add New...** button. This will bring you to the Formula Builder screen described in the previous section.

2. Follow the directions above to create and use a new formula.

## To change an existing formula:

1. Highlight the formula you want to change.

2. Click the **Edit** button. This brings you to the Formulas Builder screen described above.

3. Make the changes to the formula.

4. Click **Ok** to save the updated formula.

## To delete a formula:

1. Highlight the formula you want to delete.

2. Click the **Delete** button.

3. Click **Yes** to confirm deletion.

4. Click **Close** to return to the report document.

5. ***Important:*** *You must manually review your report document and remove any reference to the deleted formula.*

## To rename a formula:

1. Highlight the formula you want to rename.

2. Click **Rename**.

3. On the Formula Name screen, type in a new name and click **Ok**.



⚠   The formula name is only used to help you maintain formulas. It is not used anywhere in your report document.