Chapter 18: Send to MS Office

Introduction

The Send to MS function under the Export menu allows you to export the current analysis to a MS Word or MS Excel file with a pre-defined template. This chapter will discuss the following:

- ❖ Export an analysis to a predefined Word template from TOPS
- ❖ Export an analysis to a predefined Excel template from TOPS
- ❖ Create a new Word template for use with TOPS data
- ❖ Create a new Excel template for use with TOPS data

MS Office Templates

TOPS Pro comes with Word and Excel templates pre-formatted to display graphics and statistics from a TOPS analysis. These templates contain special bookmarks (for Word) and field names (for Excel) to refer different data from the analysis. Please refer to Appendix G for a list of bookmarks and field names used for Word and Excel respectively.

The MS Office templates for TOPS are saved in the \TOPSAPPS\TOPSPro\msword\ folder and can be easily modified to display data in the desired format. You can also design new templates from an existing document and apply relevant bookmarks or field names at the corresponding locations.

For any newly created templates, they have to be saved in the same folder as referenced above in order for TOPS to display them as selection in the Send to Select template to export dialog box.

Export to MS Word

In this example, we will use sample analysis Cookies(Boxed and Palletized) to illustrate the send to MS Office function. Go to the File menu and select Open.

1. At the Open Analysis dialog box, select Cookies(Boxed and Palletized) under the Approved section of list in the Main Folder and click on OK.

2. The saved analysis will be opened as pictured below.
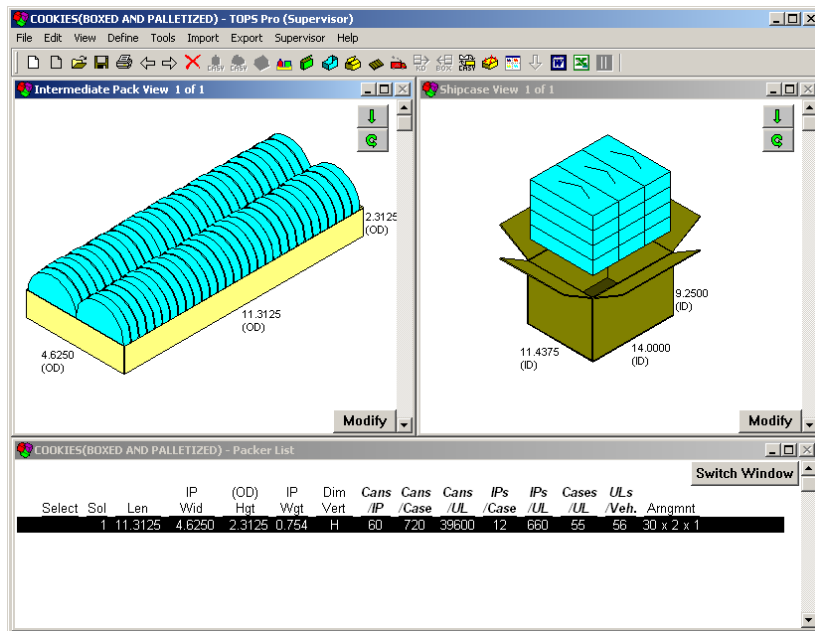
3. Go to the Export menu and select Send to MS Office or click on the icon on the tool bar. This opens the Select template to export dialog box as pictured below.
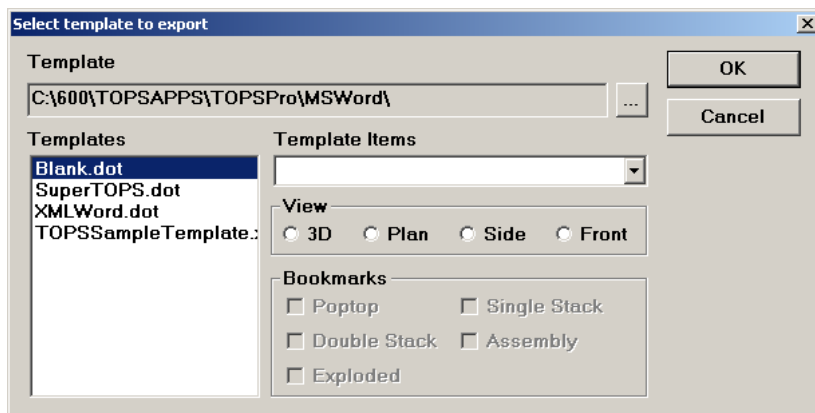
4. Highlight XMLWord.dot and click on OK.

5. TOPS will instruct your system to open MS Word.

   Note: You might see a security warning as shown below depending on the security setting in your MS Word.
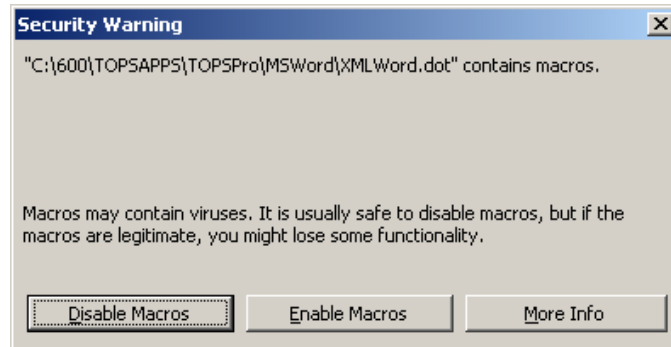
6. Click on Enable Macros if you see the above message to proceed with data export from TOPS to Word.

7. MS Word will start placing different data at assigned locations and when done, you'll see a three page document as pictured below.
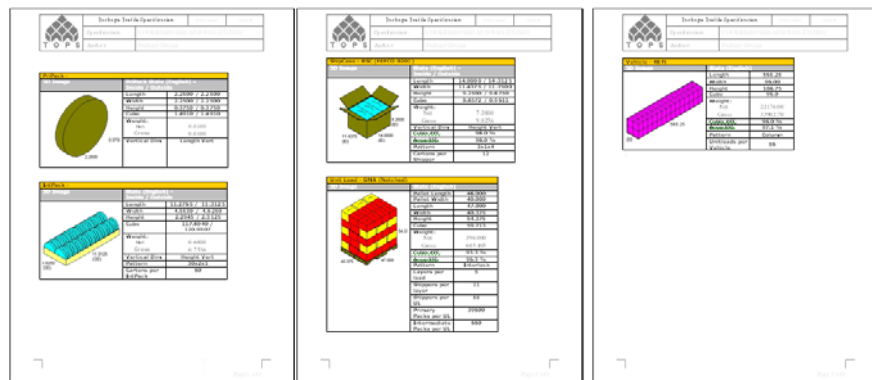
8. Save the document as desired using Word's File, Saved as function.

Note: To enable Macros in MS Word 2007, please follow these steps:

1. Click the Microsoft Office Button , and then click on Word Options.

2. Click Trust Center, click Trust Center Settings, and then click Macro Settings.

3. Click Enable all macros.

Export to MS Excel

In this example, we will again, use sample analysis Cookies(Boxed and Palletized) to illustrate the send to MS Office function.

1. Go to the File menu and select Open.

2. At the Open Analysis dialog box, select Cookies(Boxed and Palletized) in the Main Folder and click on OK.

3. The saved analysis will be opened.

4. Go to the Export menu and select Send to MS Office or click on the icon on the Tool Bar. This opens the Select template to export dialog box as pictured below.
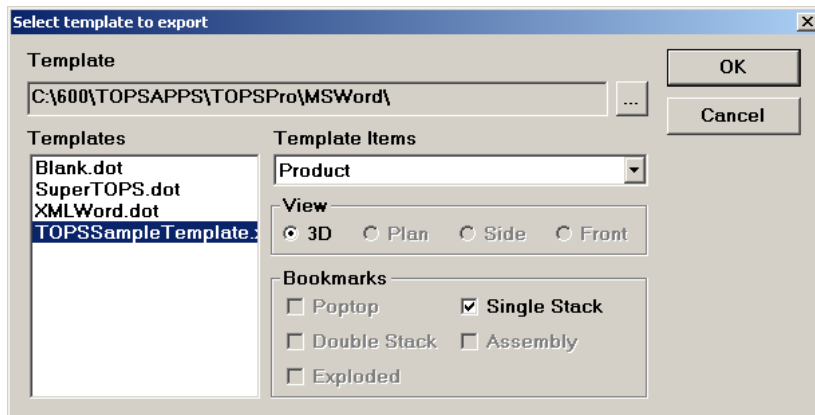
5. Highlight TOPSSampleTemplate.xls and click on OK.

6. TOPS will instruct your system to open MS Excel.

7. MS Excel will start placing different data at assigned locations and when done, you'll see a worksheet with the following layout.

8. Save the document as desired using Excel's File, Saved as function.

Create a Custom Word Template

To create a custom Word template for TOPS Pro, these are the steps you should follow:

- ❖ Copy an existing Word template from TOPS system
- ❖ Format the document to the report format as desired
- ❖ Place data and graphic using TOPS bookmarks in corresponding locations
- ❖ Save the document as a Word template in \TOPSAPPS\TOPSPro\msword folder

Followed are the instructions in more detail:

Copy Blank.dot to MyTemplate.dot

1. Right click on the My Computer icon on your desktop and select Explore on the pop-up menu.

2. Navigate to the folder where document templates for TOPS Pro were installed (normally \PROGRAM FILES\TOPSAPPS\TOPSPRO\msword\ folder) as pictured below.
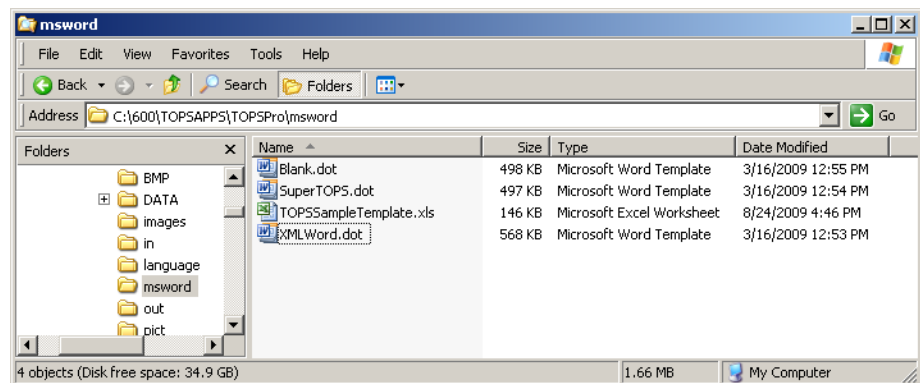
3. Right click on the document Blank.dot and select Copy at the pop-up dialog box.

4. With the mouse button anywhere in the folder list, right click the mouse button and select Copy at the pop-up dialog box as pictured below.
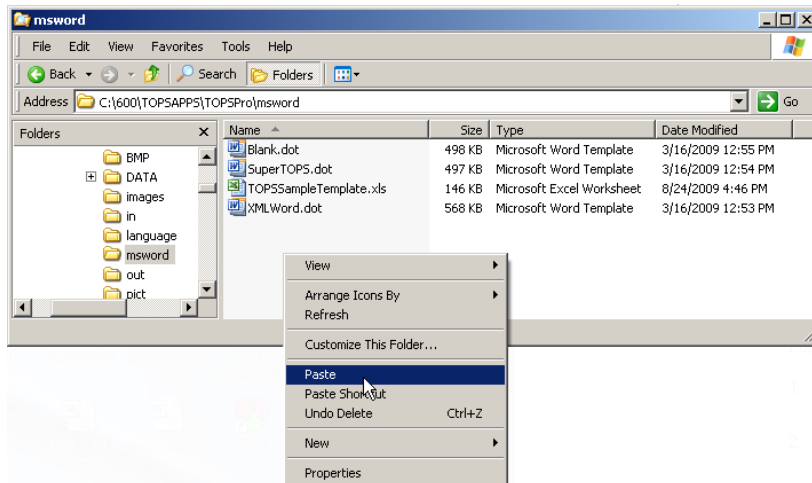
5. A new file call Copy of Blank.dot will be created.

6. Right click on the new file Copy of Blank.dot and select rename at the pop-up dialog box.

7. When the filename is highlighted, edit the text to "MyTemplate.dot" and press Enter on the keyboard.

We have just created a new blank template file named MyTemplate.dot in the \TOPSAPPS\TOPSPro\msword\ folder.

Format the Template

In this illustration, we are using Word 2003 and references are also provided for Word 2007. If you are using other versions of Word, please use the corresponding commands.

1. Right click the file MyTemplate.dot and select Open in the pop-up menu to open it in Word.

   Note: Make sure that you open the dot file as instructed or directly from within Word. **Double clicking a dot file would only create a new document file based on the dot file but not opening the dot file.**

2. Click on Enable Macros to use macros created for the template file. You will see a new blank document opened in Word.

3. Note that there is a new menu item "Tops" in the Menu Bar and when clicked on gives the option Tops Bookmark as pictured on the next page.
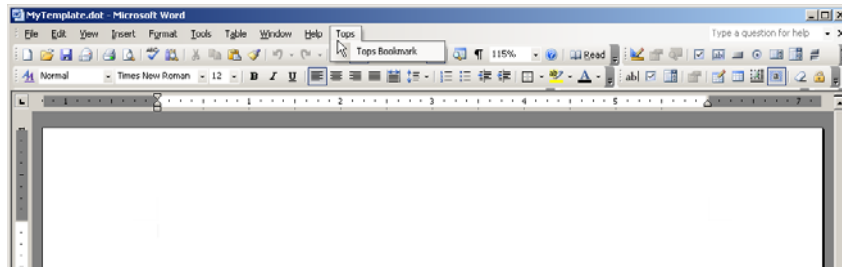
In Word 2007, you will find "Tops" under the "Add-Ins" menu. Click on this menu and then click on the drop down arrow next to "Tops" to view the defined bookmarks.
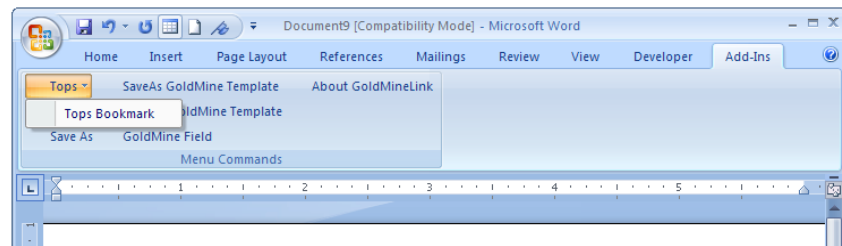
4. Format the new Word report as needed. In the sample report below, the different areas contain statistics and images from TOPS as pictured below.
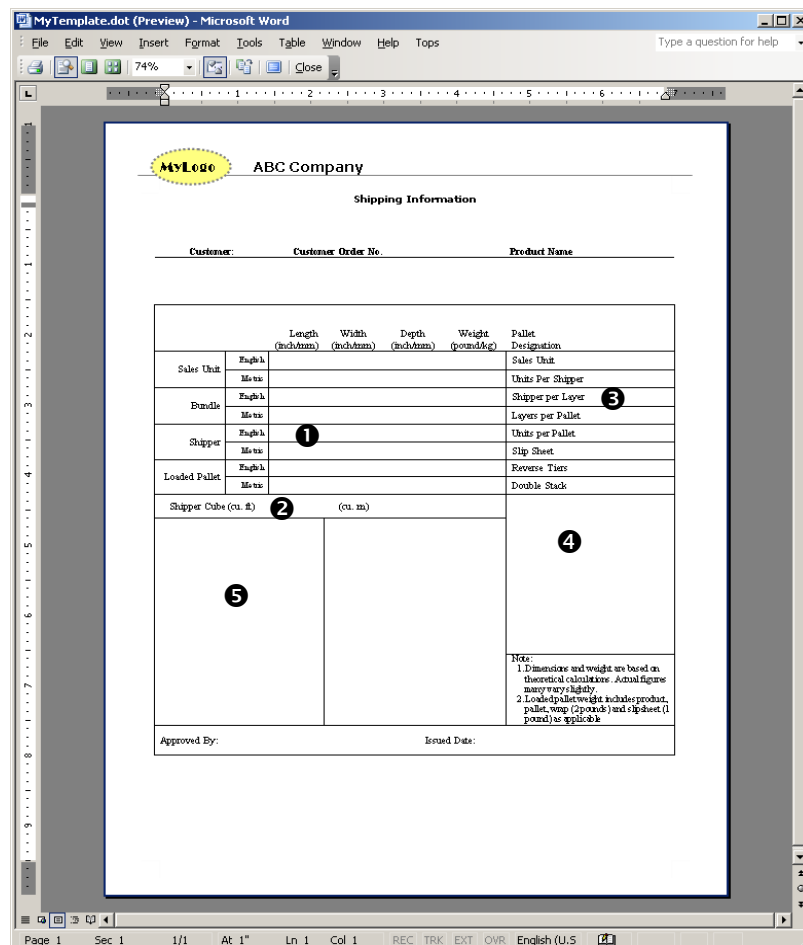
Add Tops Bookmarks

To add the graphics and statistics in the marked area, we will use the Tops Bookmarks saved in this word template file. A list of Tops bookmarks is available in Appendix G.
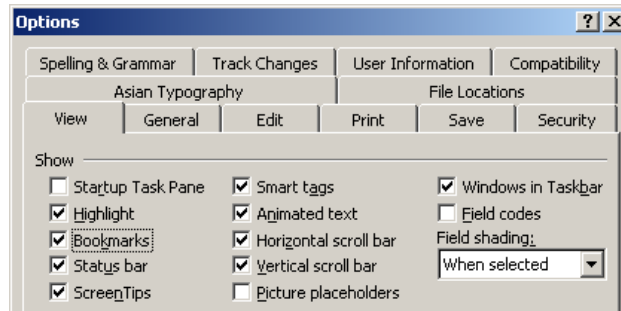
Before adding the bookmarks, please make sure bookmarks (I) are visible within Word. Go to Word's Tools menu and select Options…, make sure the Bookmarks check box under the View tab is checked as pictured below. Click on OK to save the setting.

In World 2007, click the Microsoft Office button and then click on Word Options. Click Advanced and then scroll down to the Show document content section and check "Show Bookmarks".
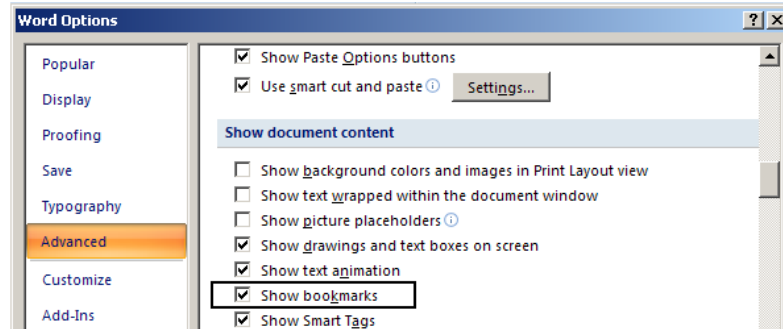
In this example, we will add the following bookmarks in the highlighted areas of the report as shown on the previous page:

❖ Area 1: Shipcase length in inches (STATS_SHIPPER_LEN)

❖ Area 2: Shipcase cube in cubic inches (STATS_SHIPPER_CUBE)

❖ Area 3: Number of shipcase per layer (STATS_UL_PER_LAYER)

❖ Area 4: Unitload 3D view (IMAGE_UL_SINGLE_STACK_3D)

❖ Area 5: Intermediate Pack 3D view (IMAGE_IP_SINGLE_STACK_3D)

1. To insert Shipcase length in inches, click in the area marked ❶, go to Tops menu and click on Tops Bookmarks. The Tops Bookmarks dialog box, as pictured below, appears.
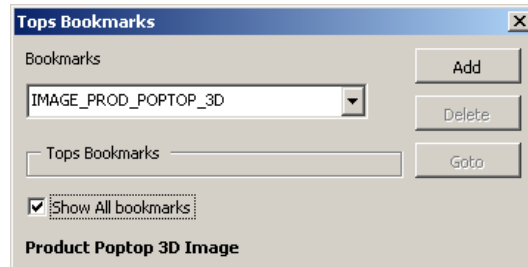
Note that you can also check the Show All bookmarks option in this dialog box to show added bookmarks in the document.
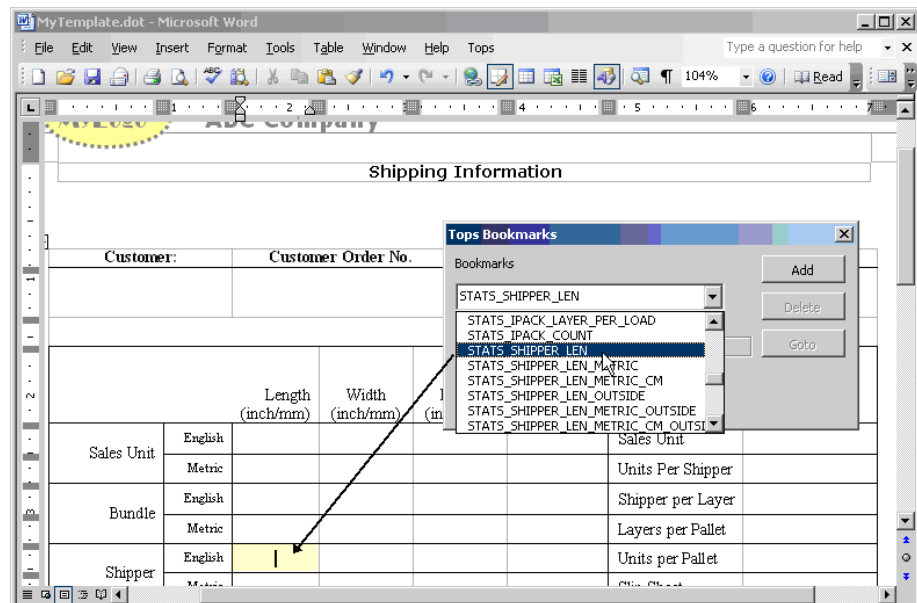
2. Click on the drop-down list, scroll though the list and highlight STAT_SHIPPER_LEN; click on the Add button as pictured below.

3. The text cursor (|) now changes to a bookmark indicator (I) in the highlighted above.

4. Now select bookmark STATS_SHIPPER_CUBE from the list, click on the Shipper Cube field, area ❷ and click on the Add button in the TOPS Bookmarks dialog to add the bookmark.
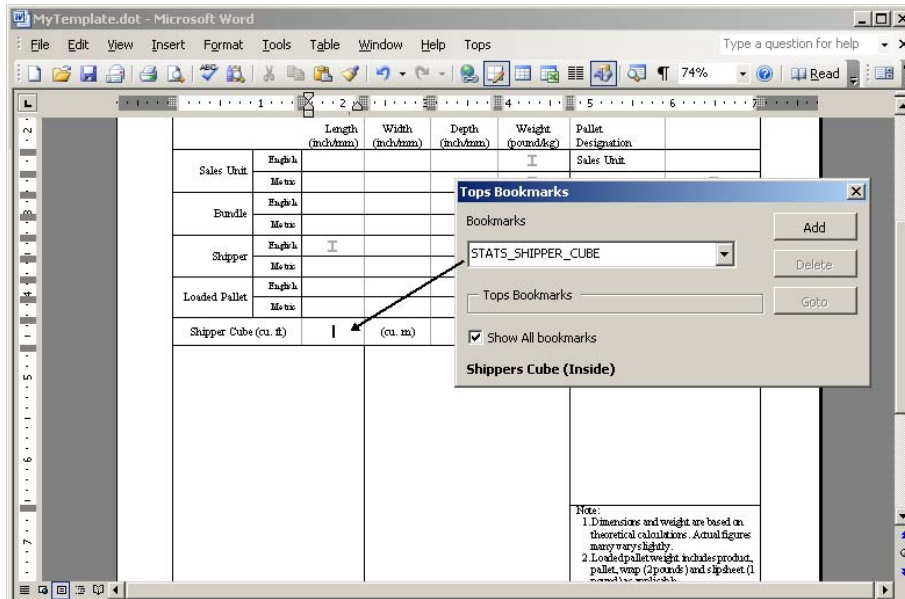
5. To add shipper per unitload layer, select STATS_UL_PER_LAYER from the list, click on the area as pictured below and click on the Add button in the TOPS Bookmarks dialog to add the bookmark.
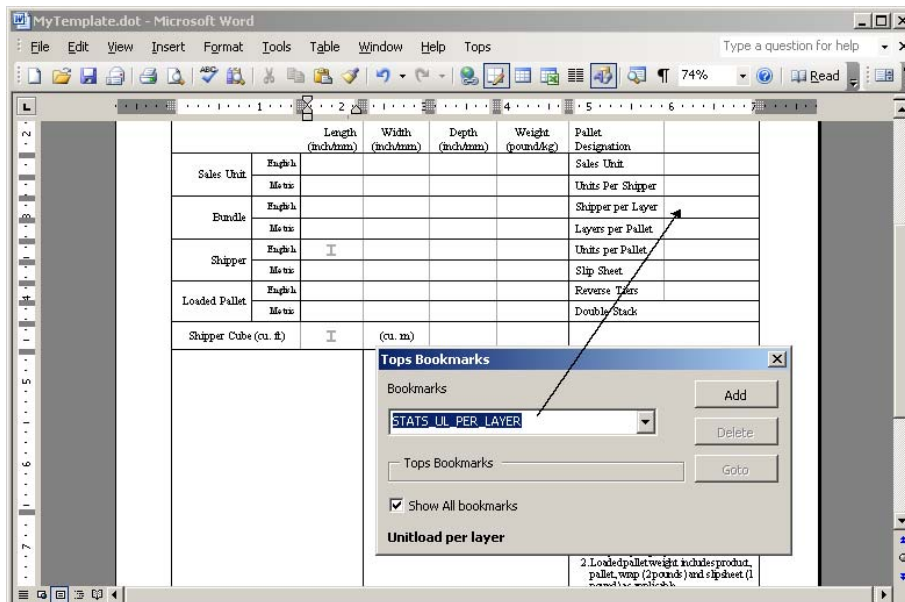
6. To add the intermediate pack 3D graphic, select IMAGE_IP_SINGLE_STACK_3D from the list, click on the area as pictured below and click on the Add button in the TOPS Bookmarks dialog to add the bookmark.
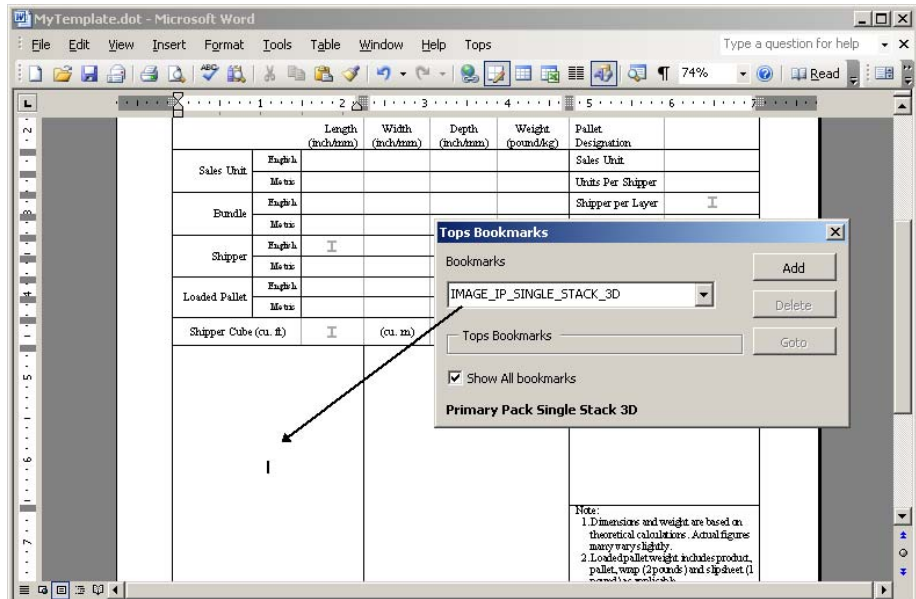
7. To add the unitload 3D graphic, select IMAGE_UL_SINGLE_STACK_3D from the list, click on the area as pictured below and click on the Add button in the TOPS Bookmarks dialog to add the bookmark.
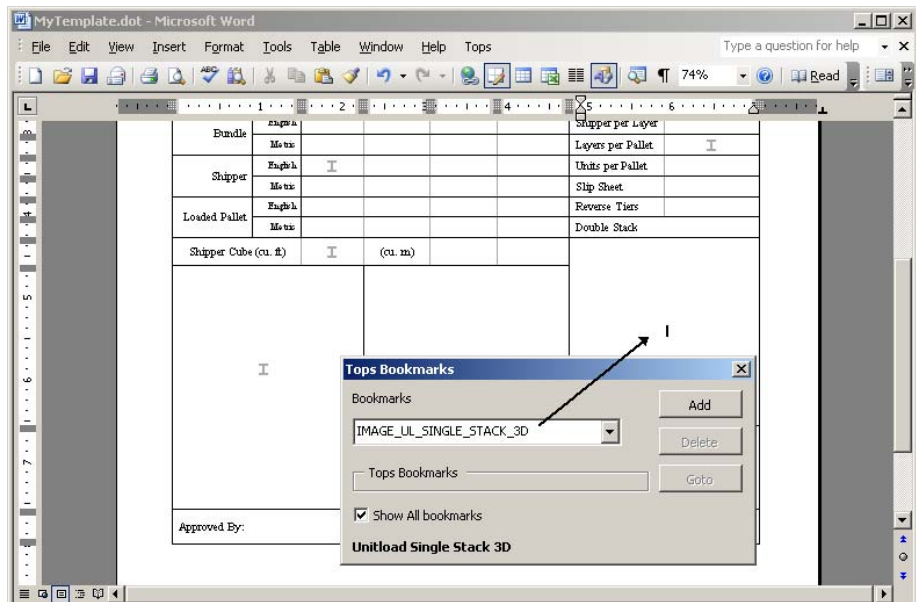
8. After all 5 bookmarks have been added, go to Word's File menu and select Save to save the changes to the MyTemplate.dot file. Exit MS Word. This template is now ready for use in TOPS.

9. Now go back to TOPS Pro, with the current analysis Cookies(Boxed and Palletized) still open, go to the Export menu and select Export to

MS Office. You should now see the MyTemplate.dot under the list of available Templates.

10. Highlight MyTemplate.dot and click on OK.

11. MS Word will open with the Security Warning message. Click on Enable Macros and a new document using the selected template will be open as pictured on the next page.

Note the five areas we have bookmarked are now populated with the corresponding data and graphics.
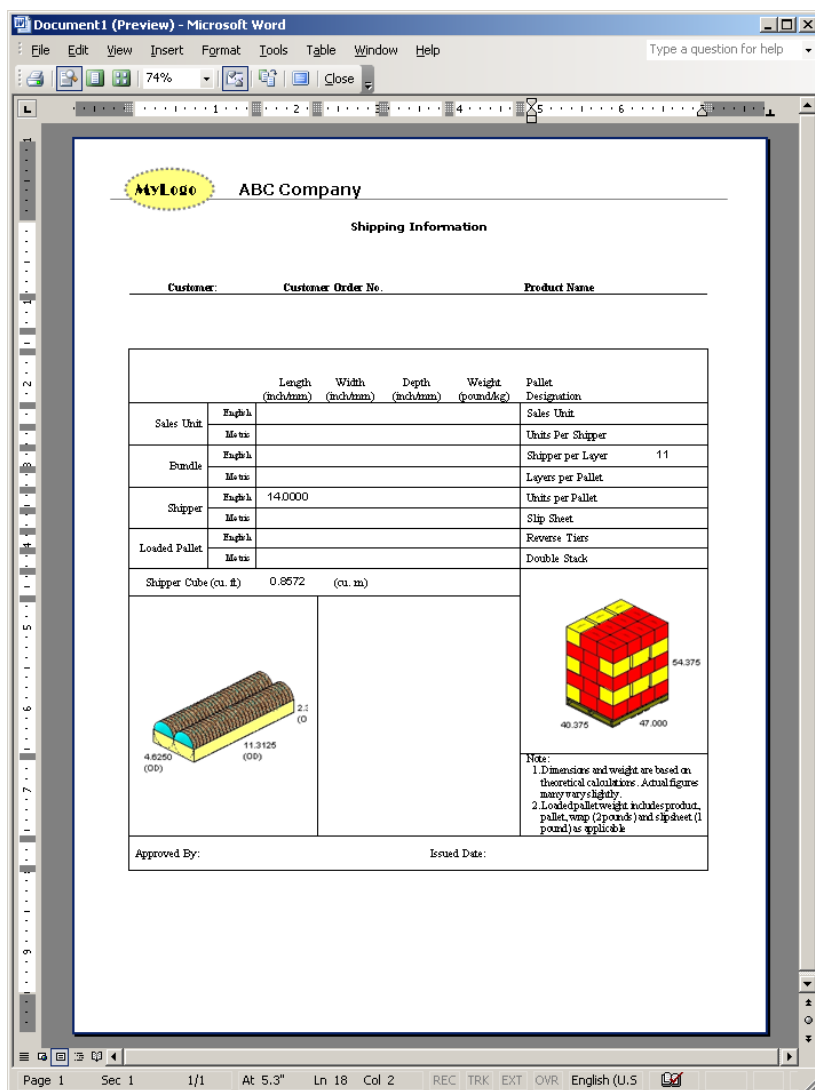
Tips on Using Bookmarks in MS Word

1. The TOPS menu on Word's menu bar or under its Add-Ins menu is only available when you open the template file in the \TOPSAPPS\TOPSPro\msword\ but not a word document based on the TOPS template file.

2. If you want to review an assigned bookmark in a Word template, go to Tops menu and open Tops Bookmarks. Place the text cursor next to the bookmark, the Tops Bookmarks dialog box will display the name of the bookmark.

3. To delete an assigned bookmark, follow tip #2 above and then click on the Delete button. The bookmark cursor (I) will be removed.

4. The state of the Add, Delete and Goto buttons – active or being grayed out – gives you the hint if the selected bookmark has been assigned in the template.

    ❖ When the Add button is active - the selection has not been bookmarked

    ❖ When the Add button is inactive (gray out), the selected bookmark exists in the current document. Click on the Goto button to bring the text cursor to the selected bookmark, then click on the Delete button should you want to remove the bookmark.

Create a Custom Excel Template

In MS Excel, TOPS data, including both images and statistics, are placed into designated cells defined by **Range Names**. These names are similar to bookmarks in MS Word and given cell references for placement of different data.

The TOPSSampleTemplate.xls provided with TOPS contains defined names for most statistics and most 3D images from different stages of a TOPS analysis. The easiest way is to adapt this template and redefine the cell reference for data placement.

Please follow these instructions to create a custom Excel template.

❖ Save a copy of the TOPSSampleTemplate.xls to a new file and make sure it is saved in the \TOPSAPPS\TOPSPRO\msword\ folder

❖ Change the layout of the worksheet as desired

❖ Change the cell reference of the Range Names

Create & Format a New Worksheet in Excel Template

1. Open Excel, browse to the folder \TOPSAPPS\TOPSPRO\msowrd\ and open TOPSSampleTemplate.xls as pictured below.
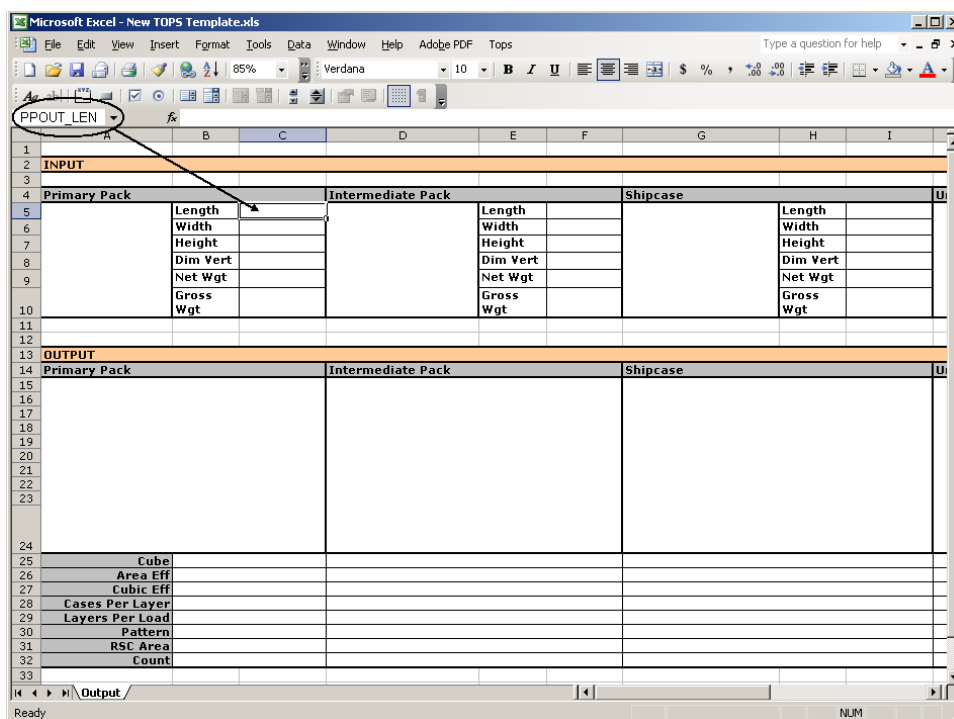
The circled area is called is the Name Box and displays any name defined for the active cell (C5 in this example on the previous page).

If you click the drop down triangle next to the Name Box, you will see a list of names defined in the current workbook. When you click on any of these names, Excel will go to the cell or cell range where the name is referenced. For example, the name IMAGE_SC_POPTOP_3D refers to the cell G15 which has been merged to two columns on its right and nine rows beneath it.
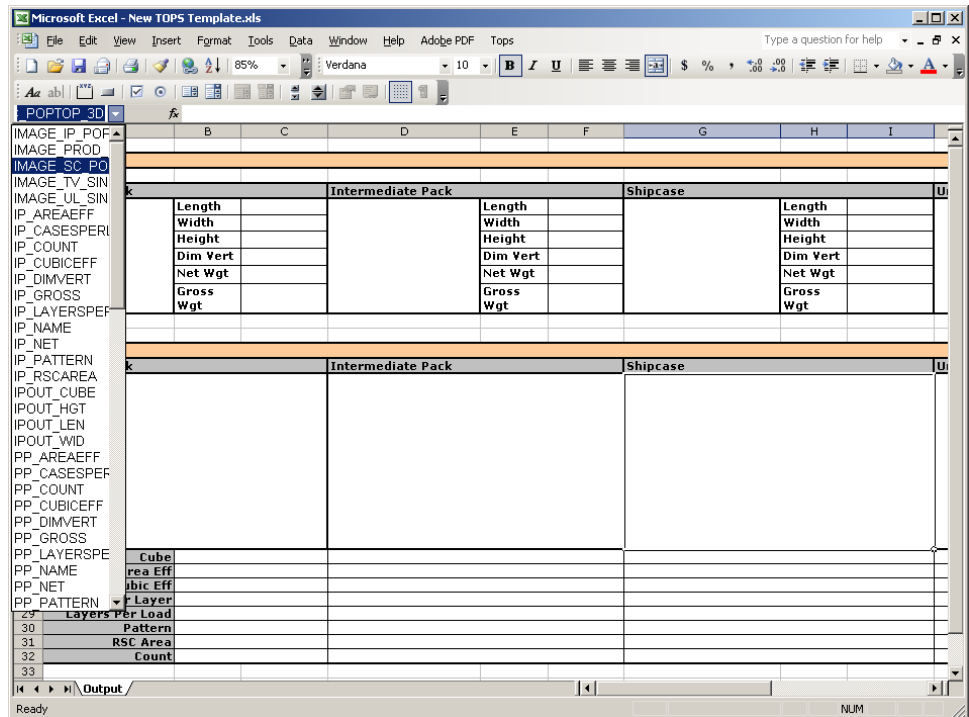
2. Go to File menu, select Save As and enter "New TOPS Template.xls" in the File name field and click on the Save Button to save the sample template under the new name.

3. Now insert a new worksheet in current workbook by going to the Insert menu and then select Worksheet. A new worksheet called Sheet2 will be added.

4. Go to Sheet2 and create the report layout as desired. An example similar to the one created in MS Word example is pictured on the next page.
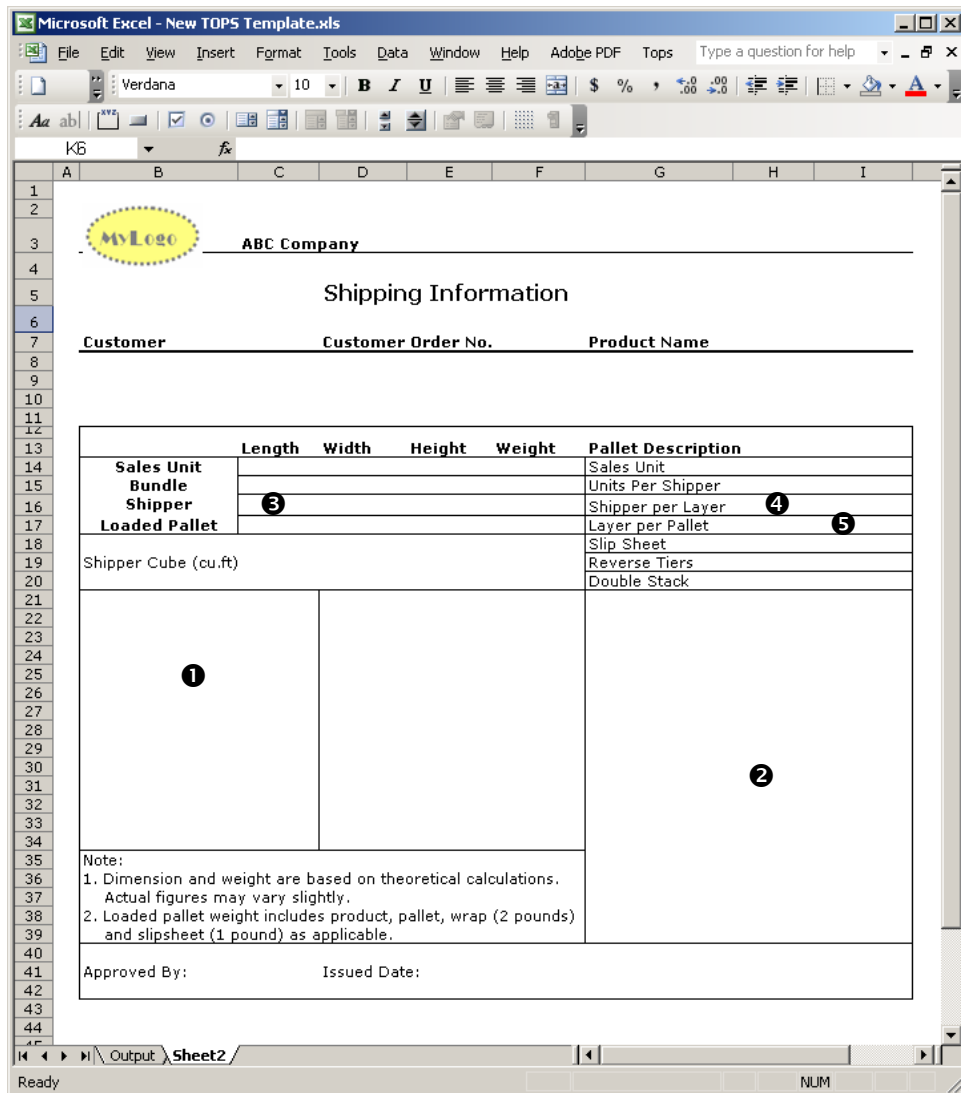
Assign New Cell References

In this illustration, we are using Excel 2003. If you are using another versions of Word, please use the corresponding commands. There are two ways to assign new cell reference to defined names:

❖ Go to the Insert menu, select Name and then Define. Change the cell reference to the new worksheet and new cell.

❖ Drag and drop existing cell content from the existing worksheet (Output) to the new worksheet (Sheet2).

Note: The source and target cell need to be of the same dimension.
**Note:** To drag across worksheet, bring the mouse cursor to the

worksheet tabs and press the [Alt] key to highlight the new worksheet, release the [Alt] key when you are in the new worksheet. You will need to keep the left mouse button pressed all this time with the cell content until you reach the destination cell in the new worksheet.

Note: When using the drag-and-drop method, any cell formatting will also be brought over to the new cell.

We will illustrate the first method of changing cell reference using the menu function. In this example, we will add the following in the highlighted areas of the report as shown on the previous page:

❖ Area 1 (cell B21): Intermediate Pack pop top 3D view (IMAGE_IP_POPTOP_3D)

❖ Area 2 (cell G21): Unitload 3D view (IMAGE_UL_SINGLE_STACK_3D)

❖ Area 3 (cell C16): Shipcase outside length dimension (SCOUT_LEN)

❖ Area 4 (cell H16): Number of shipcase per layer (UL_CASESPERLAYER)

❖ Area 5 (cell H17): Number of shipcase layer per pallet (UL_LAYERSPERLOAD)

1. Go to Insert menu, select Name and then Define, the Define Name dialog box appears as pictured below.
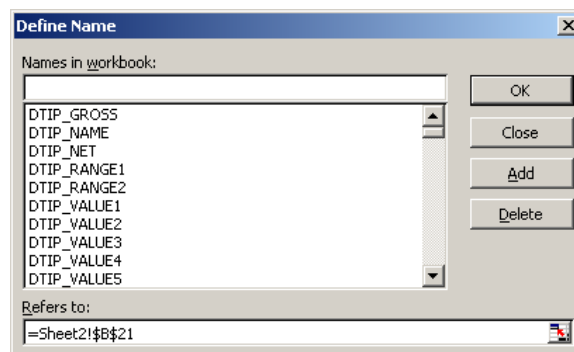

2. Scroll down the list until you see IMAGE_IP_POPTOP_3D. The Refers to: field shows "=Output!$D$15" – the cell reference in the existing sample worksheet.

3. With the name highlighted, change the reference field to "=Sheet2!$B$21" as pictured on the next page and click on the Add button.
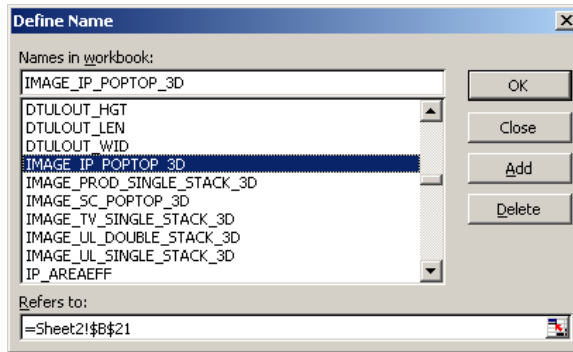
4. Next, highlight IMAGE_UL_SINGLE_STACK_3D and change the reference to "=Sheet2!$G$21" and click on the Add button.
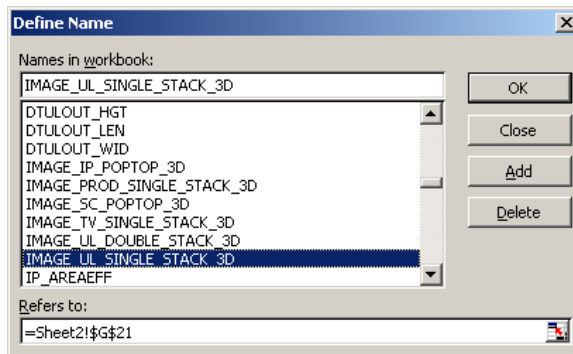
5. To assign new reference to shipcase length, select SCOUT_LEN from the list and change the cell reference to "=Sheet2!$C$16" and click on the Add button.
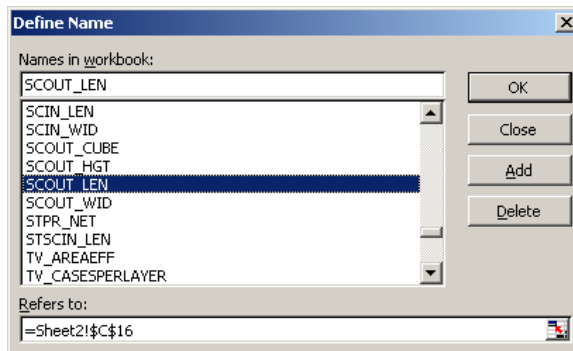

6. Repeat the step and assign UL_CASESPERLAYER to cell Sheet2!$H$16 and UL_LAYERSPERLOAD to cell Sheet2!$H$17 respectively.

7. Click Ok to close the Define Name dialog box.

8. Save the workbook and exit MS Excel.

9. Now, go back to TOPS Pro and open analysis "Cookies (Boxed and Palletized).

10. Click on the Send to Excel icon ![icon] on the tool bar to open the Select template to export dialog as pictured below.
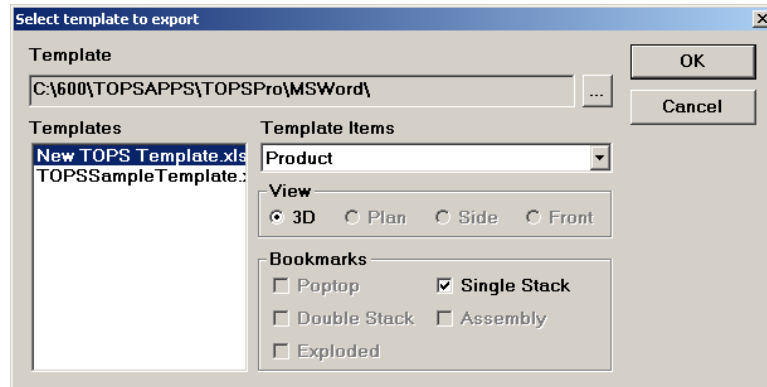
11. Select New TOPS Template.xls and click on the OK button.

12. MS Excel will open displaying the contents of the Output worksheet in the workbook. Click on the Sheet2 tab to view the new populated report as pictured below.
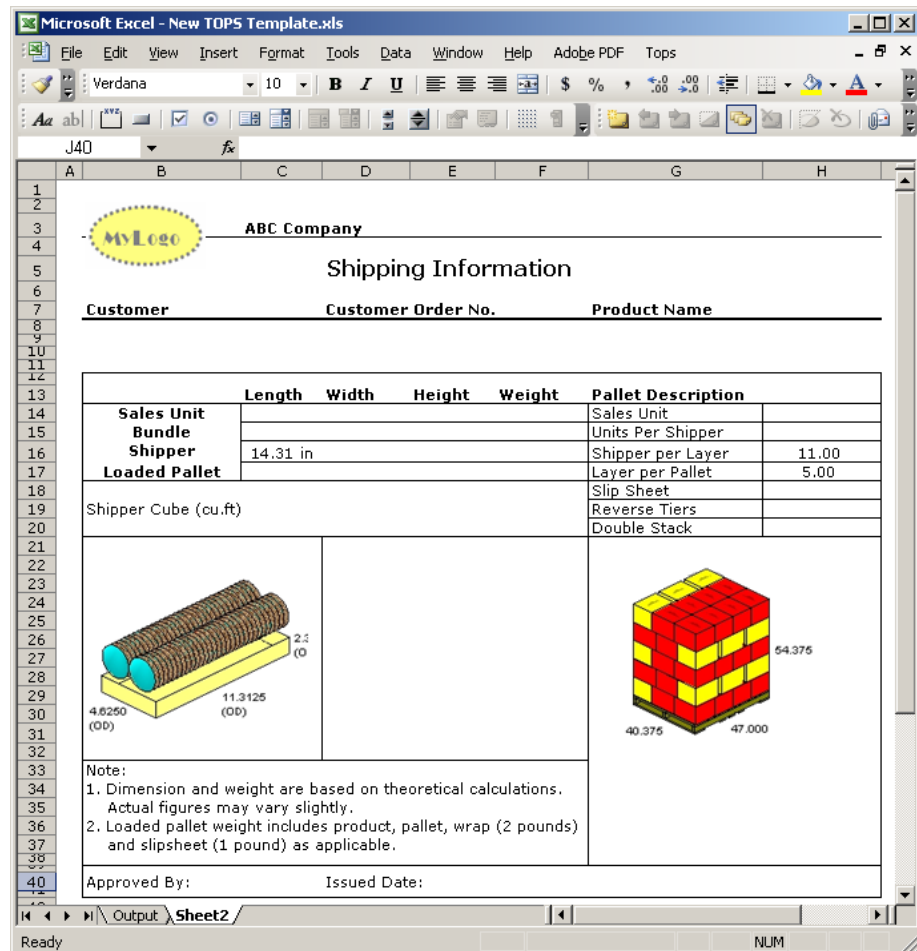
Tips on Using TOPS Templates in MS Excel

1. Make sure the Excel template is saved in the \TOPSAPPS\TOPSPro\msword\ folder in order to appear in the template list in TOPS Pro.

2. You can hide the Output worksheet from the workbook so it will show your report on Sheet2 right away. To do so, click the tab "Output" to make it active, then go to Format menu, select Sheet and then Hide.

3. The Name Box shows all Names used in the current workbook. To view all available defined names, including those with no reference, you'll need to go to the Inset menu, select Name and then Define.

4. Do not delete any Defined Names in the workbook.

5. If you need images that are not currently defined, please contact TOPS technical support.