EXPORT TO EXCEL - V2

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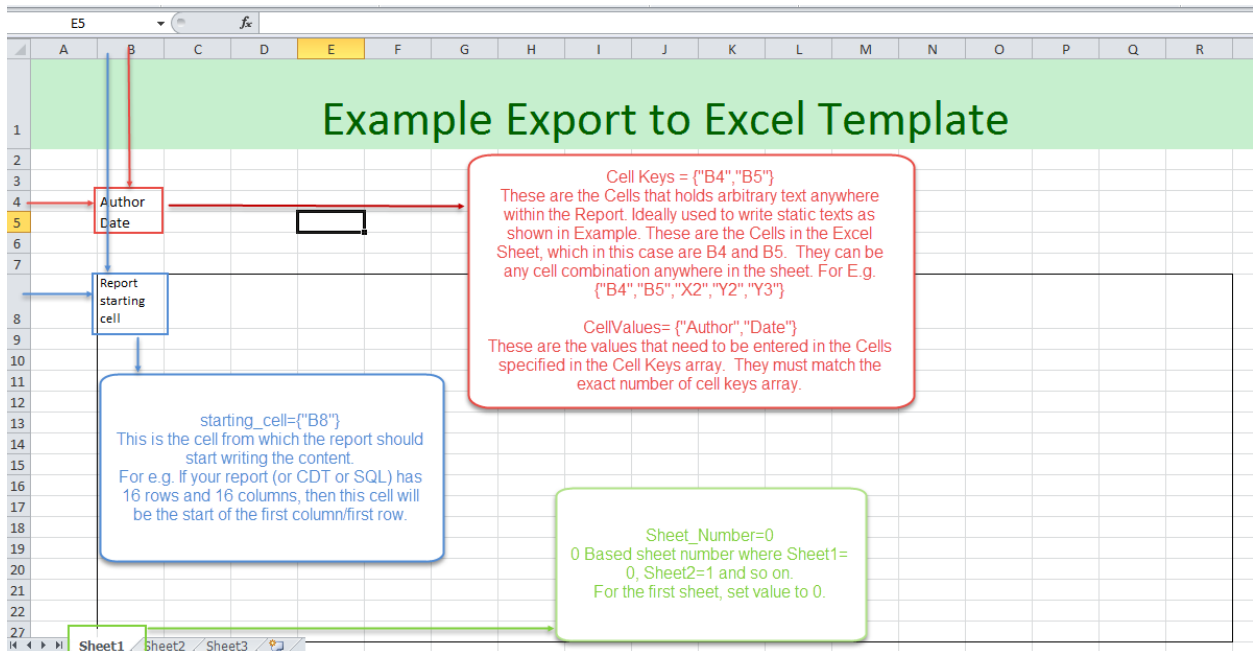@date: 01/Sep/2014

Version: v 1.0

INTRODUCTION

The document shows how to use the three smart services exported as part of this plug-in.

The smart services are

1. Export Report to Excel
2. Export SQL to Excel
3. Export CDT to Excel.

BACKGROUND OF HOW THIS PLUG-IN WORKS

This section provides you with a brief idea of how the plug-in works so you can relate them to the fields when configuring the smart services.

Example Export to Excel Template

Author
Date

Report starting cell

Cell Keys = {"B4","B5"}
These are the Cells that holds arbitrary text anywhere within the Report. Ideally used to write static texts as shown in Example. These are the Cells in the Excel Sheet, which in this case are B4 and B5. They can be any cell combination anywhere in the sheet. For E.g. {"B4","B5","X2","Y2","Y3"}

CellValues= {"Author","Date"}
These are the values that need to be entered in the Cells specified in the Cell Keys array. They must match the exact number of cell keys array.

starting_cell={"B8"}
This is the cell from which the report should start writing the content.
For e.g. If your report (or CDT or SQL) has 16 rows and 16 columns, then this cell will be the start of the first column/first row.

Sheet_Number=0
0 Based sheet number where Sheet1= 0, Sheet2=1 and so on.
For the first sheet, set value to 0.

Sheet1 | Sheet2 | Sheet3

The main items are

Cell_keys = These are Excel cells where some arbitrary text data needs to be written to. In the above diagram, these are Cells B4 and B5 where some text needs to be written which is separate to the report being exported.
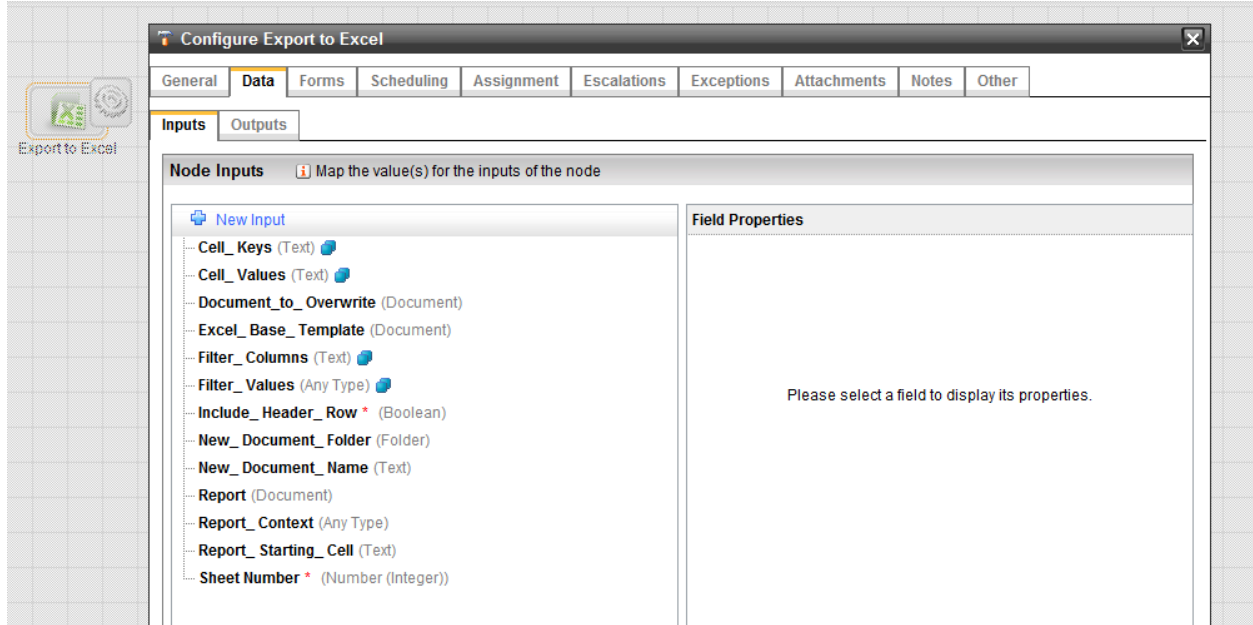
Cell_values = These are the values that are to be written into the cells specified in Cell_keys. In the above diagram, the values are {"Author","Date"}

Report_starting_cell = This is the Excel cell from which the report data should be started from. This is the first row/first column of your report. In the above example, it is "B8"

Sheet_Number = This is the Excel sheet number. Sheet1 (default) is 0, Sheet2 is 1 and so on.

EXPORT REPORT TO EXCEL

This Smart services exports Appian's Analytics Report (NOT tempo report) to Excel file.

Input	Required?	Description
Cell_keys	N	As specified above
Cell_values	N	As specified above
Document_to_overwrite	N	Specify a document that you want to overwrite with this one. It should be of the same type (.xlsx) and should exist in the Appian document management system
Excel_base_template	Y	This is the base template to use. Any .xlsx file can be used. (Note: Macros' won't be automatically executed when filling-in data)
Filter_columns	N	Text name of columns to apply as filters. For e.g, If I want to filter for department where name = "Sales", the value for Filer_column will be {"Department"}
Filter_values	N	The value to filter by. Taking the above example, if I want to filter by department=sales, then the filter value will be {"Sales"}
Include_header_Row	N	Indicate if the Report header (report column names) should form the first column of the report. If you specify the names directly in the template, you can set this to false.
New_document_folder	Y	Folder where the generated document should be saved
New_document	Y	Name of the new document that is generated
Report	Y	The Appian analytics report to execute. (Not tempo report)
Report_starting_cell	Y	As explained above
Sheet_number	Y	As explained above

This smart service exports the output of an SQL statement to Excel
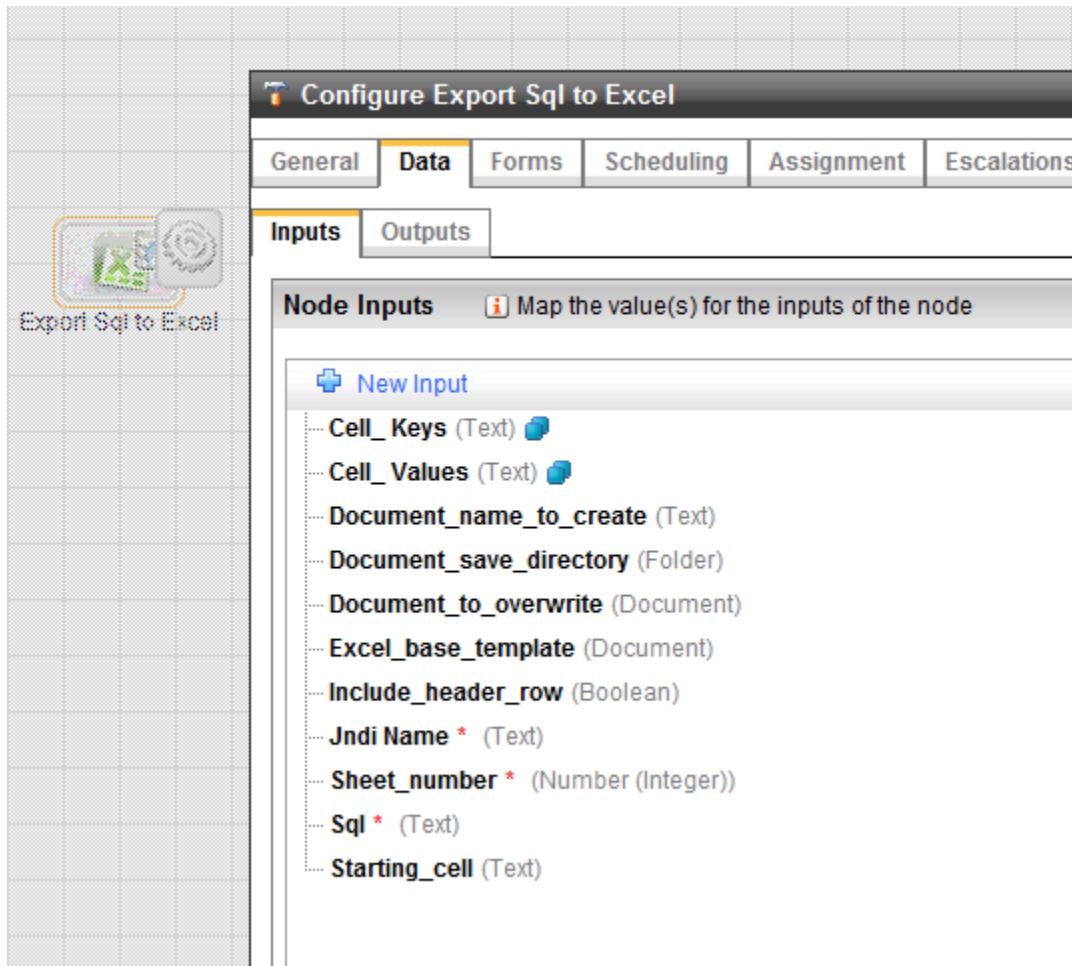
Input	Required?	Description
Cell_keys	N	As specified above
Cell_values	N	As specified above
Document_name_to_create	Y	Name of the new document to create
Document_save_directory	Y	The directory in Appian where the file will be saved
Document_to_overwrite	N	Specify if an existing document requires to be overwritten.
Excel_base_template	Y	The excel base template to use for exporting
Include_header_row	N	Specify if the SQL column names should form the first row of the excel export table.
JNDI_Name	Y	The JNDI name to use to query SQL data. Use the Query Database node to fetch this value. (example shown below)
SQL	Y	The SQL statement to execute. Use alias if you are using calculations in your statement.
Stating_cell	Y	As explained above.

Query Database

Configure Query Database

General	**Setup**	Data	Forms	Scheduling	Assignment	Escalat

Database Connection

Select the data source:

- ⦿ Use a pre-defined data source
- ○ Set up a custom data source

Pre-defined Source Name:

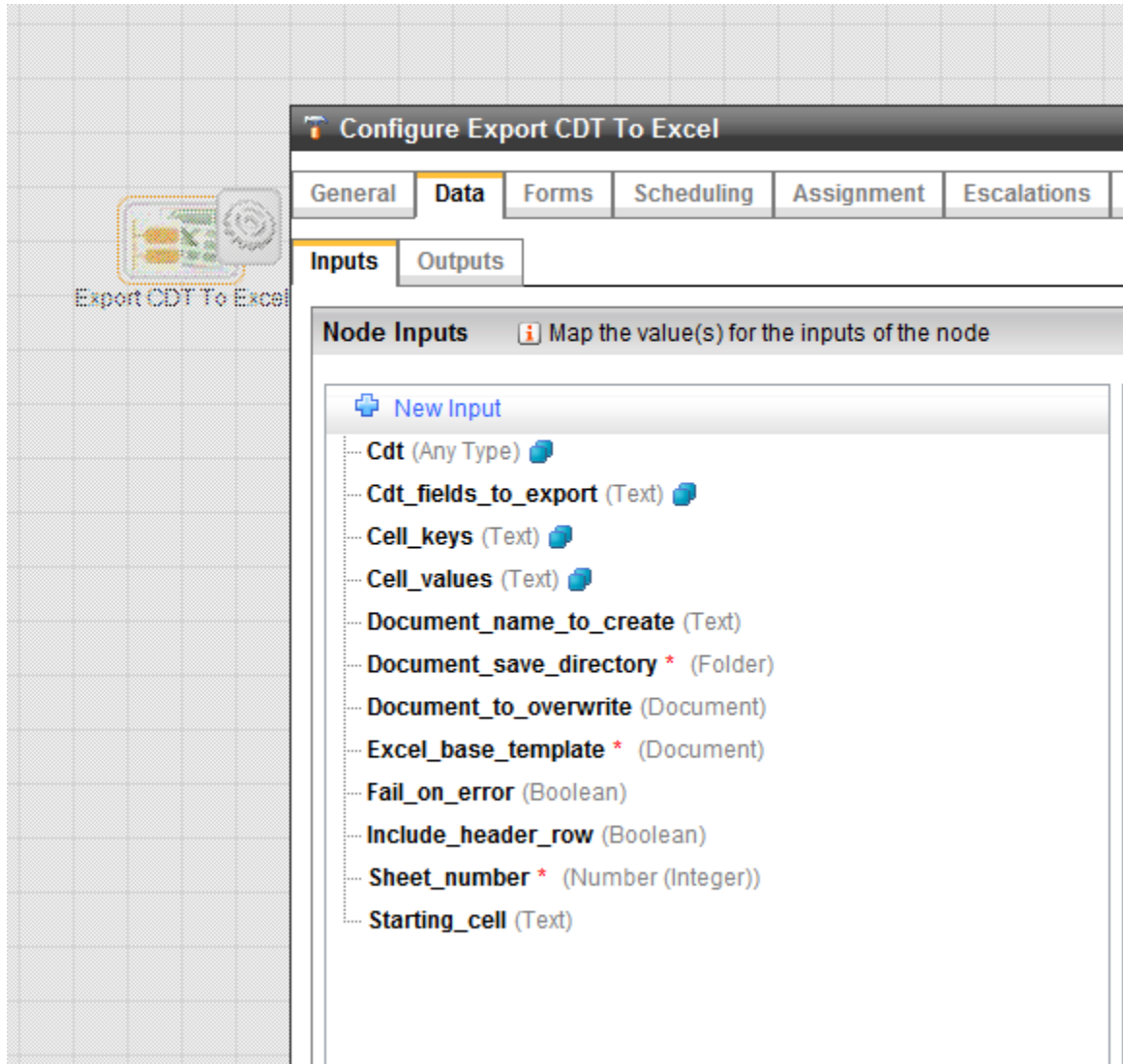| Select data source... |
|-----------------------|
| jdbc/AppianBusinessDS |

Database Queries   ℹ SQL statements to be run.

➕ New Query   ✖ Delete Query   ⬆ Move Up   ⬇ Move Down

	Name	SQL Statement
☐	1	

This smart service exports content of a CDT to Excel. This treats and writes every CDT as a ROW in excel.

Input	Required?	Description
Cell_keys	N	As specified above
Cell_values	N	As specified above
CDT	Y	CDT array to export. This can be a CDT array of a Query Rule directly. The system automatically detects the CDT type.
Cdt_fields_to_export	N	An optional array of fields to export from the CDT. If left blank, all will be exported. Alternatively, use this to select only those fields that you want to export and/or arrange the columns in the format you require. The names MUST exactly match the names of the fields in the CDT definition. E.g. {"employeeName","department","salary"}
Document_name_to_create	Y	Name of the new document that is created
Document_save_directory	Y	Location of the folder where the created document is saved

Docuent_to_overwrite	N	Optional document that requires overwritten with the generated one
Excel_base_template	Y	Excel base template to use for the report
Fail_on_error	N	A Boolean flag to indicate if the smart service should FAIL when it encounters an error or continue. Default is fail on error.
Include_header_row	Y	Indicate if the CDT element name should form the name of the table header row. (Remember, this will be exactly the name of the CDT attribute. An alternate approach is to define the header in the excel sheet and set this to false)
Starting_cell	Y	As specified above
Sheet_number	Y	As specified above

FORUM

Component can be downloaded from

https://forum.appian.com/suite/tempo/records/type/components/item/i8BWsQdLlzKy55h8z8zJ0sPqpDWFrba_rZVrKig4w4IzpN9C1oU7no1wKrf9QozdA/view/summary

For any further details, use Appian forum (forum.appian.com)