

Microsoft Excel: A Superb Report Template Tool

Turn your MS Excel knowledge into reporting expertise

You already know Microsoft Excel® is excellent spreadsheet software. Intuitive commands, custom formulas and comprehensive sorting and filtering tools are just a few of the features that help make Excel one of the most popular software programs in the world.

But Excel is for more than just spreadsheets. It's also the foundation of a full-featured, full-blown reporting program. And it's a reporting program that saves you time, money and headaches.

When you input your data into report templates designed and generated in Microsoft Excel, you can take advantage of all Excel has to offer—plus some additional benefits. Here are the top 10 reasons why Excel is an ideal reporting tool.

#1. You save money—lots of it.

The typical reporting process looks like this: A business user needs a report. A developer creates the report template. The business user provides feedback. The developer edits the template. The business user provides more feedback... and so on. The process is slow, expensive and frustrating.

But with reporting in Excel, this cycle is eliminated. Because the business user can design reports in the Excel environment, there's no need for the cumbersome back-and-forth. When you consider how much time this saves per report, you can quickly calculate how the savings add up across your enterprise.

AO29		=SUM(AO16:AO28)					
	A	B	AH	AI	AJ	AK	AL
1			Jan-05	Feb-05	Mar-05	Apr-05	May-05
2	Balance by Account Type	Cash & Equivalent	\$ 316	\$ 319	\$ (755)	\$ (394)	\$ (1,646)
3		Saving	\$ 19,969	\$ 15,549	\$ 6,261	\$ 7,580	\$ 8,196
4		Brokerage	\$ 17,284	\$ 15,960	\$ 15,045	\$ 15,859	\$ 15,428
5		Roth IRA	\$ -	\$ -	\$ -	\$ -	\$ -
6		401(k)	\$ 29,770	\$ 33,081	\$ 36,494	\$ 40,262	\$ 43,901
7		Stock Option	\$ -	\$ -	\$ -	\$ -	\$ -
8		ESPP	\$ 1,187	\$ 2,406	\$ 4,028	\$ 1,219	\$ 2,438
9		Home Equity	\$ 76,618	\$ 77,471	\$ 78,324	\$ 79,179	\$ 80,034
10		Other Assets	\$ 7,775	\$ 7,650	\$ 7,525	\$ 7,400	\$ 7,275
11		Receivable (Payable)	\$ (3,566)	\$ (3,215)	\$ (3,146)	\$ (1,390)	\$ (974)
12		Reserve Funds	\$ (295)	\$ (355)	\$ (356)	\$ (416)	\$ (375)
13		Loans	\$ (6,188)	\$ (8,260)	\$ (2,964)	\$ (1,793)	\$ (4,001)
14		Tax Liability	\$ (5,265)	\$ (5,728)	\$ (5,334)	\$ (5,599)	\$ (6,436)
15		Total	\$ 137,605	\$ 134,879	\$ 135,123	\$ 141,908	\$ 143,840
16		Monthly Balance Change by Account Type	Cash & Equivalent	\$ (210)	\$ 3	\$ (1,074)	\$ 360
17	Saving		\$ (10,551)	\$ (4,420)	\$ (9,288)	\$ 1,319	\$ 616
18	Brokerage		\$ (680)	\$ (1,324)	\$ (915)	\$ 814	\$ (431)
19	Roth IRA		\$ -	\$ -	\$ -	\$ -	\$ -
20	401(k)		\$ 437	\$ 3,311	\$ 3,413	\$ 3,768	\$ 3,639
21	Stock Option		\$ -	\$ -	\$ -	\$ -	\$ -
22	ESPP		\$ (2,611)	\$ 1,219	\$ 1,622	\$ (2,809)	\$ 1,219
23	Home Equity		\$ 851	\$ 852	\$ 853	\$ 855	\$ 856
24	Other Assets		\$ (125)	\$ (125)	\$ (125)	\$ (125)	\$ (125)
25	Payable (Receivable)		\$ (278)	\$ 352	\$ 69	\$ 1,756	\$ 416
26	Reserve Funds		\$ (60)	\$ (60)	\$ (1)	\$ (60)	\$ 40
27	Loans		\$ 150	\$ (2,072)	\$ 5,296	\$ 1,171	\$ (2,208)
28	Tax Liability		\$ (640)	\$ (463)	\$ 394	\$ (265)	\$ (837)
29	Total		\$ (13,717)	\$ (2,726)	\$ 244	\$ 6,785	\$ 1,933

Excel can be a useful report template tool.

#2. You design reports quickly and easily.

Many reporting programs boast of a friendly user experience but fail to back up their claims. At its core, Excel is an intuitive interface. The ribbon displays logical groups of commands and features, making it easy to quickly perform whatever task you want without searching through complex menus. And drop-down galleries get you to the tools you need – fast. Excel provides you with access to a comprehensive set of tools without sacrificing any ease of use.

#3. You take advantage of intelligent formulas.

You’re already familiar with handy Excel formulas and functions, such as sums, averages and maximum values. Intelligent reference expansion is an exclusive feature of Excel that you can use to improve your reports.

For example, suppose a report requires the inclusion of a subset of data, such as all employees hired after a certain date. When running a report, intelligent reference expansion allows the report to expand for as many rows as necessary, based on the data being called from your data source, without you needing to know in advance how many rows to include.

#4. You benefit from numerous cell tools and features.

Intelligent reference expansion isn’t the only Excel-exclusive tool that makes reports shine. Consider cell formatting. This enables you, for instance, to format currency exactly how you want it.

Or take a look at how cells reference one another. With Excel, you can put summaries at the top of the table and tell a cell in a table to use values from other cells, something you can’t do with most other reporting programs.

And, of course, you can use conditional cell formatting to call attention to key data such as numbers greater than a specified amount or text that matches your criteria.

#5. You escape the limitations of a banded design tool.

Many tools restrict the user to what is known as “banding” – when elements of a report are limited to one band. For example, you might have a table in one layer, text in another, and so on. Excel is a non-banded (aka free-form) solution, so you can lay out elements as you wish. This gives you significantly more freedom than with other tools and ensures the final report looks the way you want it to.

IMPORTS				Comb.Total	EXPORTS			
	Service	Storage	Tax			Packaging	Shipping	Tax
Denver	\$10803	\$13090	\$10991	\$40911.98	Denver	\$19891	\$3320	\$7523
Pittsburgh	\$19002	\$2012	\$4562	\$30624.08	Pittsburgh	\$2003	\$603	\$4513
San Francisco	\$8745	\$3265	\$2513	\$50513.54	San Francisco	\$13220	\$14023	\$6541
Portland	\$4564	\$11211	\$9982	\$41122.46	Portland	\$6521	\$8972	\$4562
Quahog	\$12001	\$5520	\$6517	\$58510.10	Quahog	\$11200	\$10400	\$5478
Baltimore	\$7784	\$11100	\$9951	\$49079.95	Baltimore	\$11032	\$6587	\$512
Miami	\$9525	\$9842	\$7965	\$32395.12	Miami	\$408	\$7512	\$5412
Seattle	\$2304	\$4652	\$5620	\$22460.32	Seattle	\$6503	\$10321	\$6598
Austin	\$1400	\$13001	\$6651	\$35606.01	Austin	\$4687	\$3204	\$9456
New York	\$7784	\$11203	\$4512	\$37928.18	New York	\$7756	\$3667	\$1200
Salt Lake City	\$3321	\$6541	\$10023	\$41237.55	Salt Lake City	\$10025	\$5064	\$9957
Chicago	\$791	\$11200	\$4651	\$36510.13	Chicago	\$1254	\$8452	\$10909

PIVOT TABLES

Excel templates let you take advantage of reporting features such as Pivot Tables.

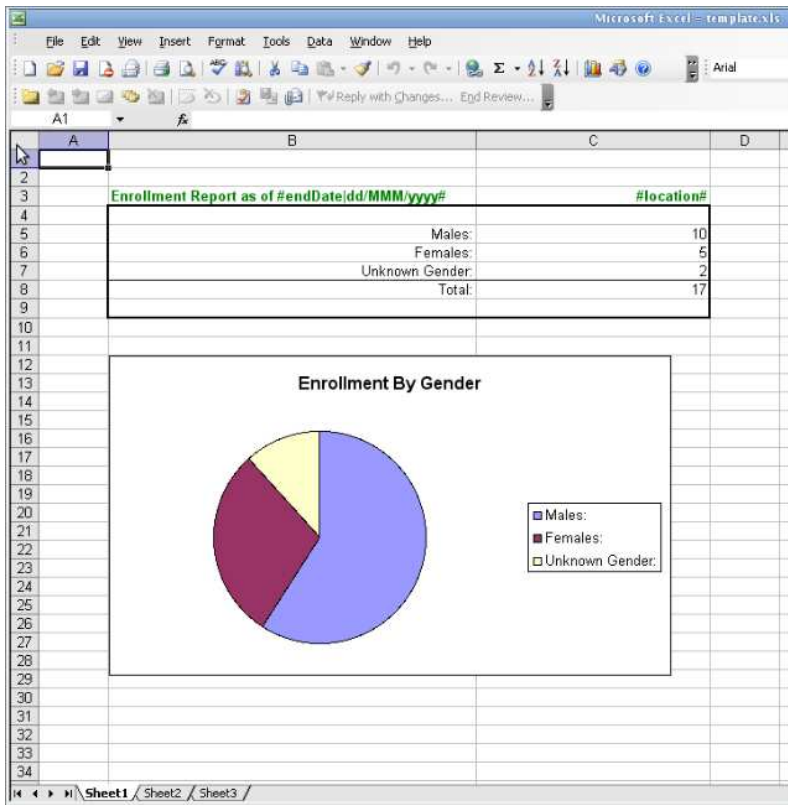
#6. You can present unlimited amounts of data.

No matter how large your final report, Excel can handle it. Excel supports up to 1 million rows and 16 thousand columns per worksheet. Plus, you can use an unlimited number of formatting options in the same workbook, and the number of cell references per cell is limited only by available memory.

#7. You get unmatched report output flexibility.

Not only is Excel an excellent report design tool, it's an adaptable report output format. Want to arrange data so it's easier to analyze? Native sorting tools provide you with a wide range of options.

Need to manipulate that eye-catching chart? Windward's Excel solution treats charts as charts and not as static images, so the report recipient can format the chart however desired. You can also easily remove sensitive pieces of information, such as salary figures, from an HR report and then distribute the report to other departments. Also, keep in mind there's nothing inherent in an Excel reporting tool that says the output must be in Excel. Some Excel report design tools provide you with the freedom to distribute an Excel document to some recipients, a PDF file to others, and an HTML report to additional recipients.



A report that uses Excel's built-in charting and graphing.

#8. You never have to leave Excel—even to access your data.

Is your data stored in Excel? Full-featured Excel reporting solutions allow you to call that data directly instead of forcing you to format or export that data into another data source. This saves you time and eliminates the risk of corrupting your data.

#9. You skip the intensive training.

Most reporting solutions rely solely on a proprietary software program. You have to adjust to a new visual interface and learn an entirely new set of controls and commands. But you already know Excel. You know how to add rows, how to sort and filter data, how to work with formulas, and how to use layout and design tools such as cell formatting. You don't need intensive training, so you can jump right in and design your report.

#10. You can collaborate with others.

When you use Excel to design reports, not only can multiple people easily learn to use the tool, but you can also work on a specific report together. Excel 2010 includes notable collaboration features such as real-time communications within a document, co-authoring of projects, and the ability to remotely access Excel files.

The Windward Difference

Are you in need of Excel reporting? Then we invite you to look at the Windward solution. We believe that reporting should be simple and that free-form template design is a must, because you deserve attractive, informative and impressive reports.

Windward provides a unique experience using Microsoft Excel to format and edit report templates. Behind the scenes, Windward's sophisticated engine pulls data from multiple sources and merges that data into your reports, creating a fast and hassle-free experience that can make generating reports fun.

Windward delivers a solution that allows IT professionals to create basic templates and business users to customize those templates and create variations to meet their document generation needs. For details about the technology and how it has been successfully deployed, please visit the [Windward Studios website for an overview video and free trial](#).

About Windward

For businesses in document-intensive industries, Windward Studios is the document generation and reporting software company that empowers business professionals to create beautiful, professional reports.

Windward OEM and enterprise customers span over 70 countries and all industries, including financial services, insurance, energy, healthcare, HR and technology. We've been delighting customers since 2004.

Our primary products are AutoTag, a design tool that creates custom templates with Microsoft Office, and a Java or .NET engine that connects to virtually any data source.

Windward delivers exceptional support, training, and documentation, with a 98% satisfaction rating from our customers. We're a Microsoft Gold and an Oracle Gold partner.

Improve Your Software Product's Reporting and Document Generation

[Download a free, 14-day trial](#) of Windward's products or [schedule a live demonstration](#).